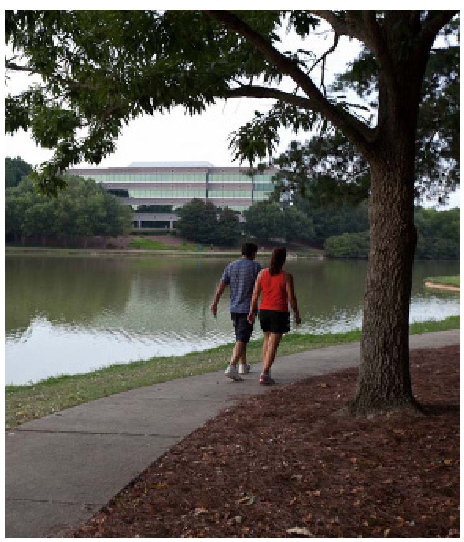
Johns Creek Strategic Economic Development Plan: 2016-2021

February 2016



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CITY OF JOHNS CREEK

2016-2021 STRATEGIC ECONOMIC DEVELOPMENT PLAN

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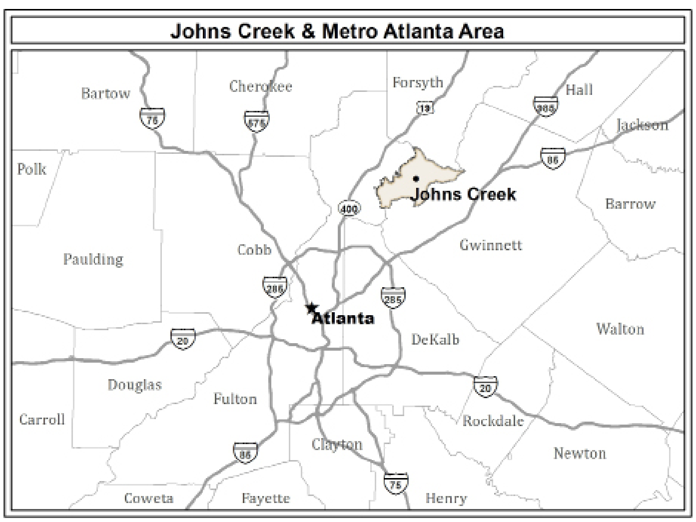
JOHNS CREEK PROFILE "WHERE ARE WE NOW?"

The City of Johns Creek incorporated in 2006. The city consists of approximately 32 square miles and has a population of approximately 83,000 residents. The city is located in the northeast portion of Fulton County, adjacent to Gwinnett County on the south and Forsyth County on the northeast. Historically a bedroom community to the greater Atlanta area, Johns Creek consists primarily of newer (30 years or less) subdivisions and residential uses with the majority of commercial and retail uses located along linear arterial strips.

Figure 1: Johns Creek Location Map.



Source: City of Johns Creek, 2015.

While the city only recently incorporated, the area known as Johns Creek developed as a premier golfing destination starting in the late 1960s. The prestigious Atlanta Athletic Club (AAC) is a private club dating back to 1898. AAC moved to the present Johns Creek location in the late 1960s and is known nationally and internationally for its facilities, having been chosen as a Platinum Club every year by the Club Leaders Forum.

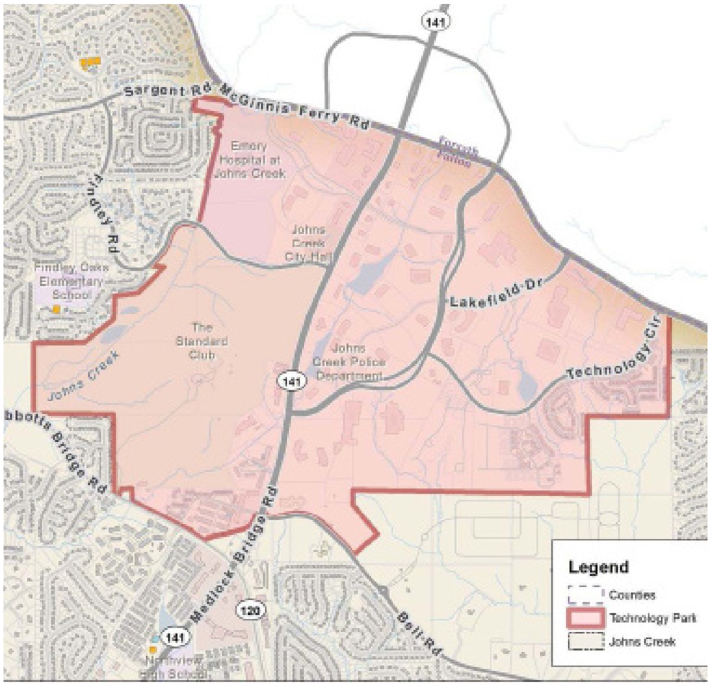
Technology Park Johns Creek was established in 1981 as a second business campus for its neighbor to the south, Technology Park Atlanta. The park was envisioned as Atlanta's center for high tech employment where working, living and recreation could all take place in the same environment. Technology Park Johns Creek is the first southeastern US property to win the prestigious FIABCI Prix d'Excellence Award for "Best Office/Industrial Property Worldwide," a globally recognized award from the Paris-based International Real Estate Federation. Today, businesses in Technology Park Johns Creek employ more than 10,000 employees, and the Park contains nearly 6 million square feet of developed office and industrial space. While envisioned as a work/live/play development, the Park was nonetheless planned as a 1980s suburban office park using the "campus" concept of separate and highly buffered development parcels or pods.

Today, Johns Creek is acknowledged as one of the premier communities in the Atlanta region, and is home to some of the best schools in the country.

Figure 2: Technology Park at Johns Creek.

Source: Strategic Planning Group, Inc., 2015.

Figure 3: Technology Park.

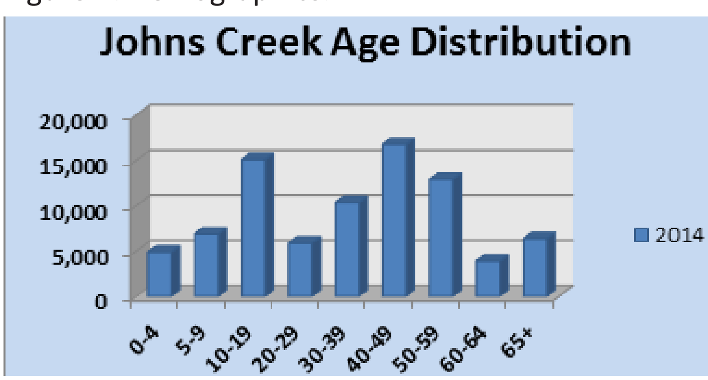


Source: City of Johns Creek, 2015.

DEMOGRAPHICS

Johns Creek is largely built-out. The city's 2014 population estimate is 83,213 residents and is projected to increase to 89,818 residents by 2019, a gain of 6,605 residents. The largest demographic is within the 40-49 age group whose children (10-19 age) represents the second largest group.

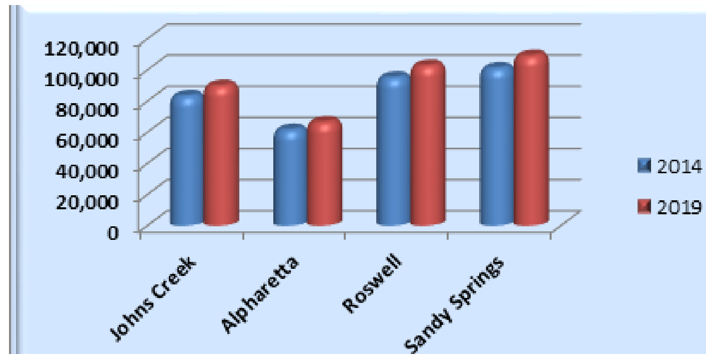
Figure 4: Demographics.



Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

Johns Creek's population is slightly less than its surrounding communities, with the exception of Alpharetta. All of these communities are projected to experience similar growth trends through 2019.

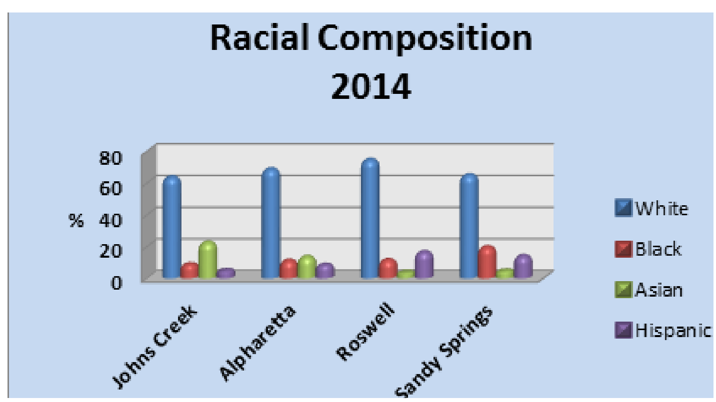
Figure 5: Comparative Population Estimates.



Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

Johns Creek's Race and Ethnicity is unique in its composition. The city has a highly diverse racial composition as shown below. According to the U.S. Census, White residents represent 63.5% of Johns Creek residents, followed by 23% Asian, 9.3% Black and 5.2% Hispanic/Latino.

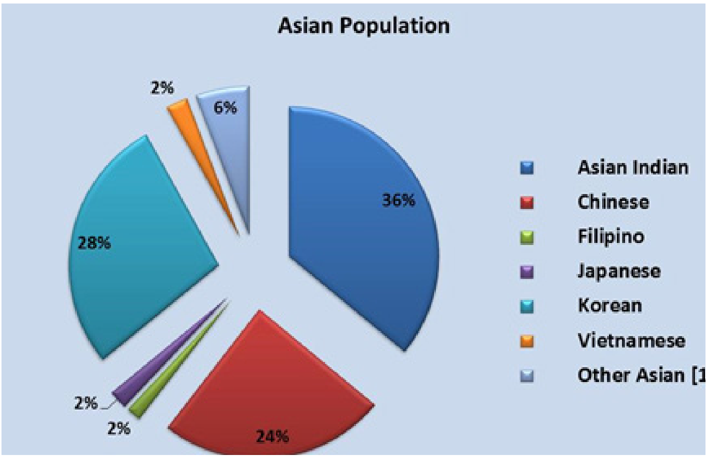
Figure 6: Racial Composition Comparison.



Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

The city's Asian population is primarily composed of three ethnicities: Indian, Korean and Chinese as shown in the following graphic.

Figure 7: Asian Population.

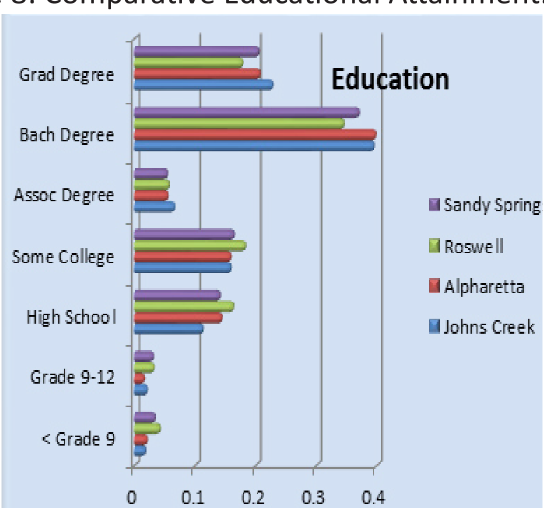


Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

SOCIO-ECONOMICS

Johns Creek residents are highly educated with 61% having a college degree or higher. Johns Creek residents have the highest percentage of graduate degrees compared to the rest of North Fulton.

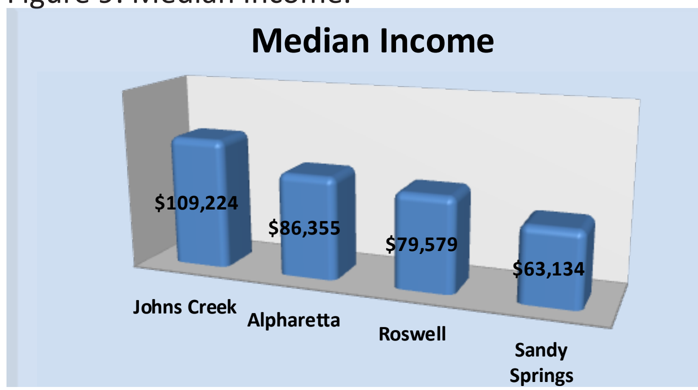
Figure 8: Comparative Educational Attainment.



Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

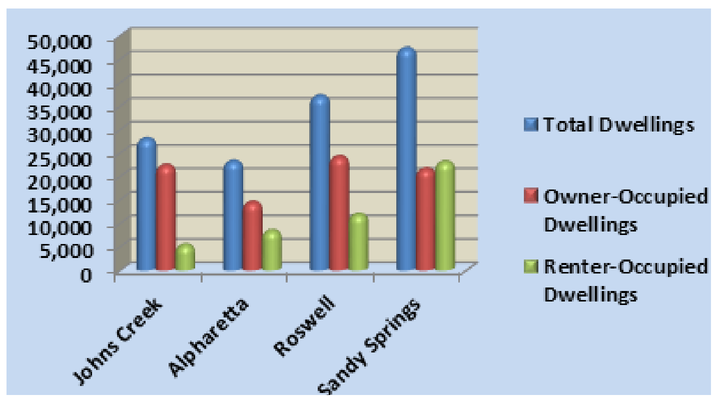
As would be expected with its high education levels, the city has a very high household median income. This is significantly higher than the other areas of North Fulton/Atlanta which can be linked to the city's high quality of life.

Figure 9: Median Income.



Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

Figure 10: Comparative Housing Ownership.

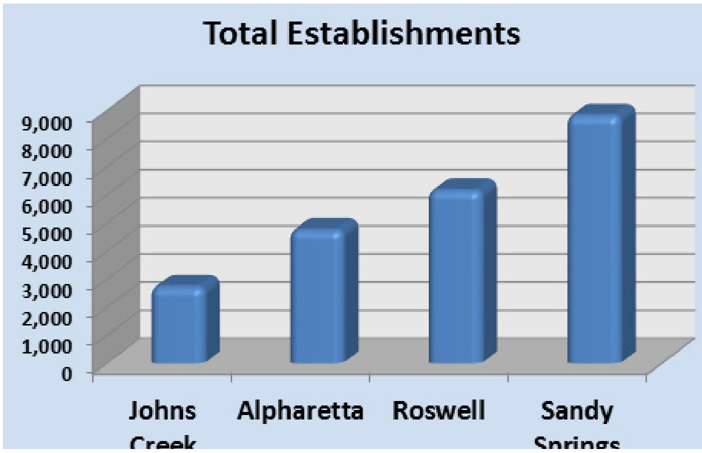


Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

EMPLOYMENT/BUSINESSES

Of the North Fulton market, Johns Creek has the smallest number of business establishments. Sandy Springs, due to its favorable location on Atlanta's perimeter has the highest number of businesses.

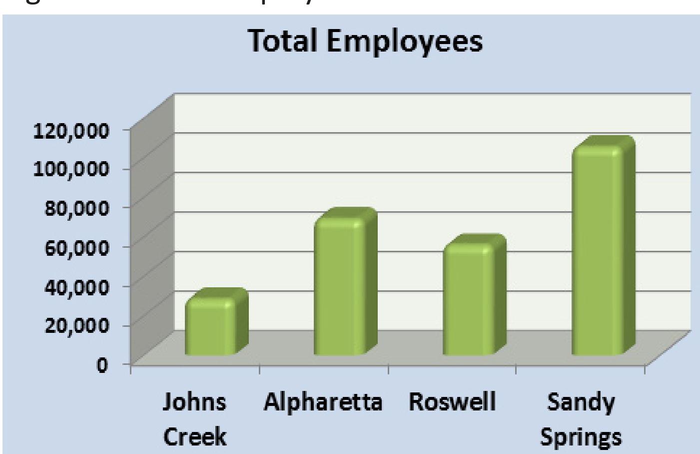
Figure 11: Number of Business Establishments.



Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

When analyzing the North Fulton market, the trends for the number of businesses and number of employees changes. While Johns Creek still has the smallest number of employees, it is interesting to note that Alpharetta has more employees than Roswell, indicating larger firms (commercial and retail) being located within its boundaries.

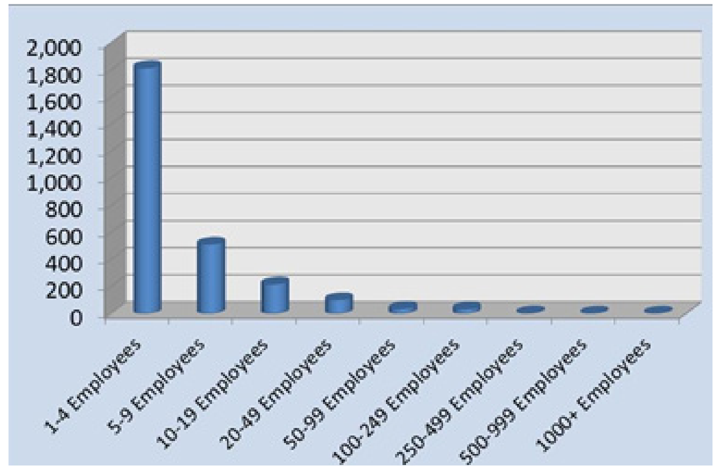
Figure 12: Total Employees.



Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

Johns Creek's business establishments are predominately small (1-4 employees).

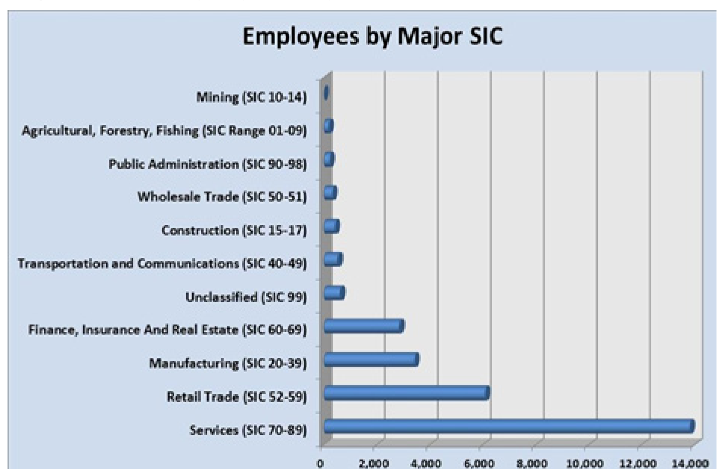
Figure 13: Johns Creek Size of Businesses.



Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

Most of the city's employment is found within the Service and Retail sectors.

Figure 14: Employees by SIC code.

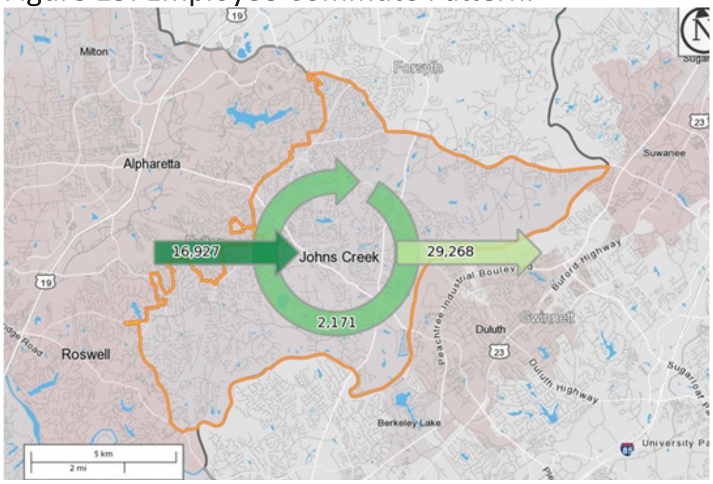


Source: U.S. Census, American Community Survey, 2015; Strategic Planning Group, Inc.

JOHNS CREEK LABOR SHED

Based on U.S. Department of Labor statistics, only 2,171 residents reside and work within the city. Slightly over 29,000 Johns Creek residents work/commute outside of the city while almost 17,000 Johns Creek employees live outside the city and commute into the city.

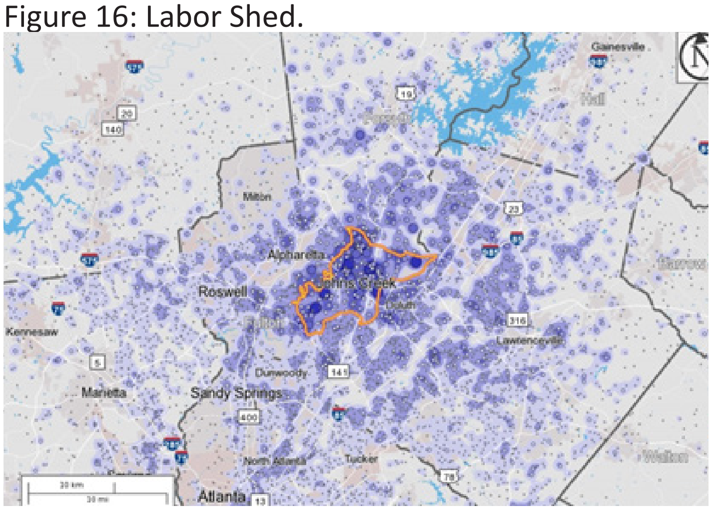
Figure 15: Employee Commute Pattern.



Source: U.S. Census, On the Map, 2015.

The city has a large labor shed as shown below. Each dot or concentration of blue dots indicate the location of Johns Creek workers.

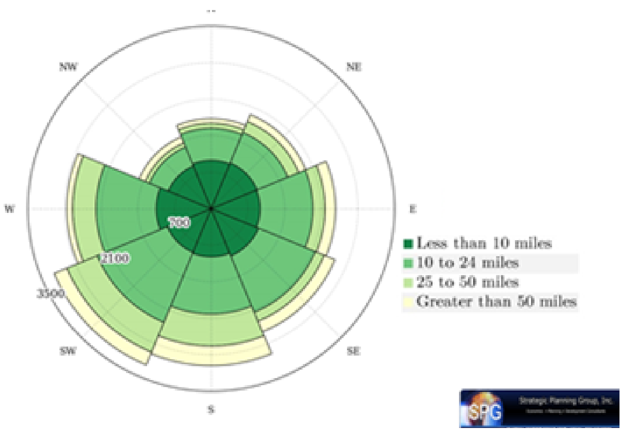
Figure 16: Labor Shed.



Source: U.S. Census, On the Map, 2015.

The following graphic provides information as to the general directions of where Johns Creek employees are coming from as well as distance traveled. It is interesting to note that 3,500 employees drive greater than 50 miles to jobs in Johns Creek.

Figure 17: Direction of Commute Patterns.

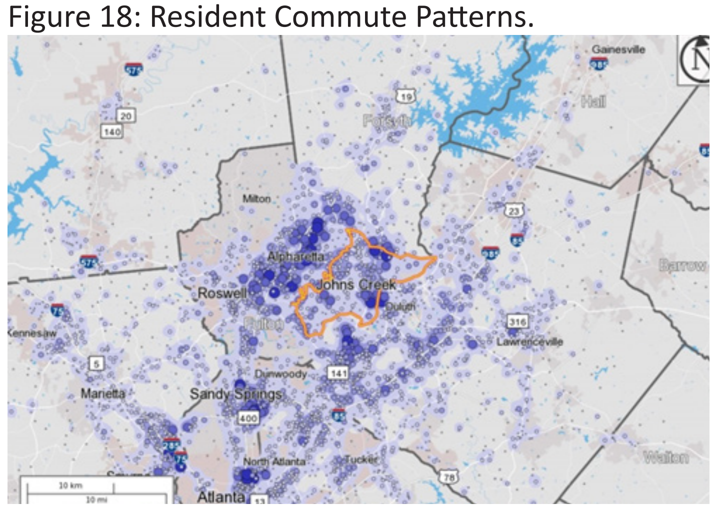


Source: U.S. Census, On the Map, 2015.

WHERE JOHNS CREEK RESIDENTS WORK

As shown below, most Johns Creek residents work in close proximity to State Road 400, primarily within Roswell and Alpharetta although a significant number work in Sandy Springs and North Atlanta.

Figure 18: Resident Commute Patterns.



Source: U.S. Census, On the Map, 2015.

OFFICE MARKET SECTOR

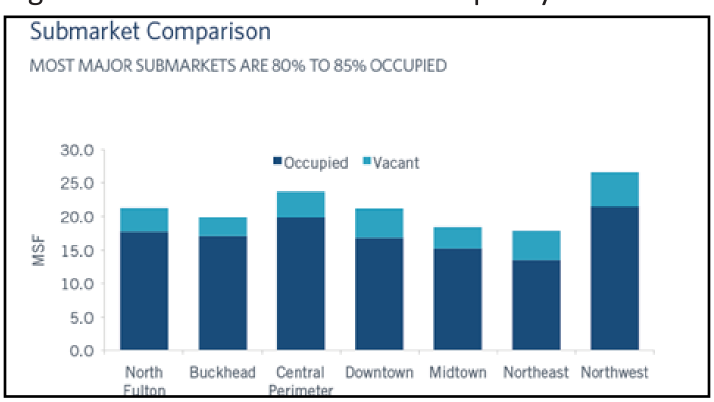
The Atlanta office market is divided into eight geographic submarkets for purposes of analysis by most of the commercial brokers within the Atlanta region. Johns Creek falls within the North Fulton market. The majority of workers drive less than 25 miles from home.

Figure 9: Atlanta Office Submarkets.

Source: SavillisStudley, 2015.

Most of the major commercial real estate brokers maintain their own inventory of office space. As of the second quarter 2015, the Atlanta office market has 221.5 million sq. ft. of total space.

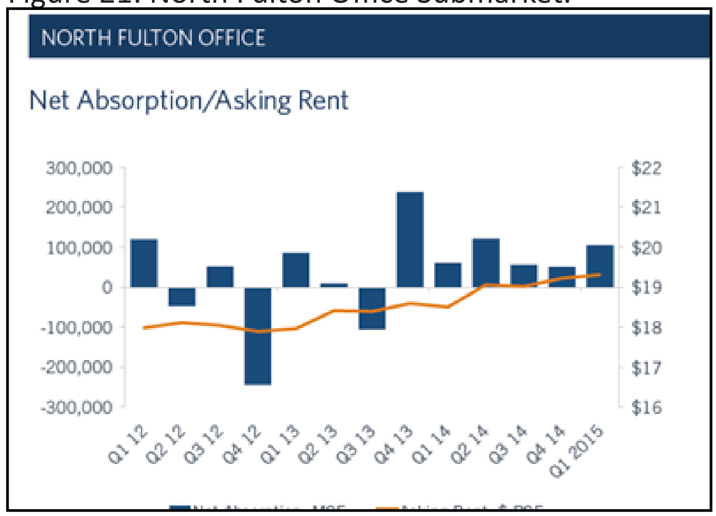
Figure 20: Atlanta Submarket Occupancy.



Source: DTZ, 2015.

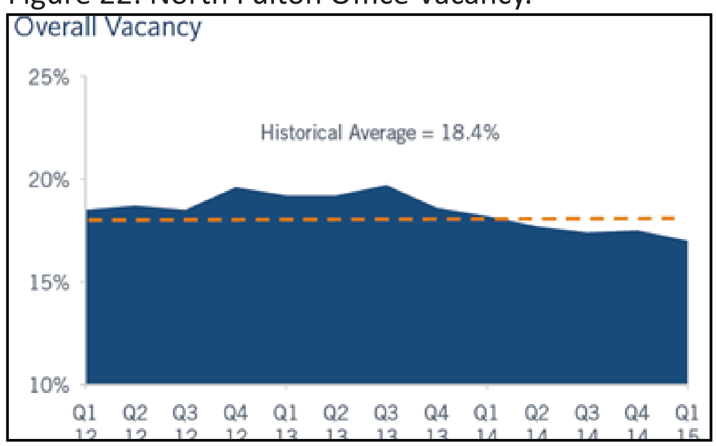
The Atlanta office market is rebounding from the Great Recession. As shown below, the North Fulton market experienced significant retraction, but has seen positive absorption since the 4th quarter 2013 and asking rents are increasing. Office lease rates for the 1st quarter 2015 averaged slightly under $20 for all classes of space (A, B and C).

Figure 21: North Fulton Office Submarket.



Source: DTZ, 2015.

Figure 22: North Fulton Office Vacancy.



Source: DTZ, 2015.

The North Fulton Existing Office Inventory is approximately 28 million sq. ft. which represents 12.6% of the Atlanta market, while the North Fulton submarket accounts for 13.6% of the region's vacancy.

Table 123: Comparative North Fulton Office Inventory, 2nd Quarter 2015.

	Existing Inventory			Total Vacancy			N Fulton
Class	Atlanta	N Fulton	%	Atlanta	N Fulton	%	Vacancy
A	112,508,526	15,408,694	13.7%	15,139,176	2,052,447	13.6%	13.3%
B	89,103,490	11,365,658	12.8%	14,543,897	1,647,373	11.3%	14.5%
C	19,920,804	1,139,580	5.7%	2,884,230	96,521	3.3%	8.5%
Total	221,532,820	27,913,932	12.6%	32,567,303	3,796,341	11.7%	13.6%

Source: Strategic Planning Group, Inc., 2015.

JOHNS CREEK OFFICE MARKET SECTOR

Based on interviews with local commercial real estate brokers, Johns Creek represents about 3% of the North Fulton office market. The city has slightly over 3 million sq. ft. of office space with almost 377,000 sq. ft. of vacant space. Average rental rates within Technology Park are among the lowest in the market at $17.92 sq. ft.

Table 2: Johns Creek Office Market.

	Technology Park	Remainder of City	Total
Inventory	2,618,879	473,750	3,092,62
No of Buildings	27	14	4
Vacant Stock	315,698	60,825	376,52
Vacancy Rate	12.10%	12.80%	12.17
Total Net Absorption	101,893	(6,633)	95,26
New Construction	-	-	-
Average Rental Rate	$17.92	$20.56	

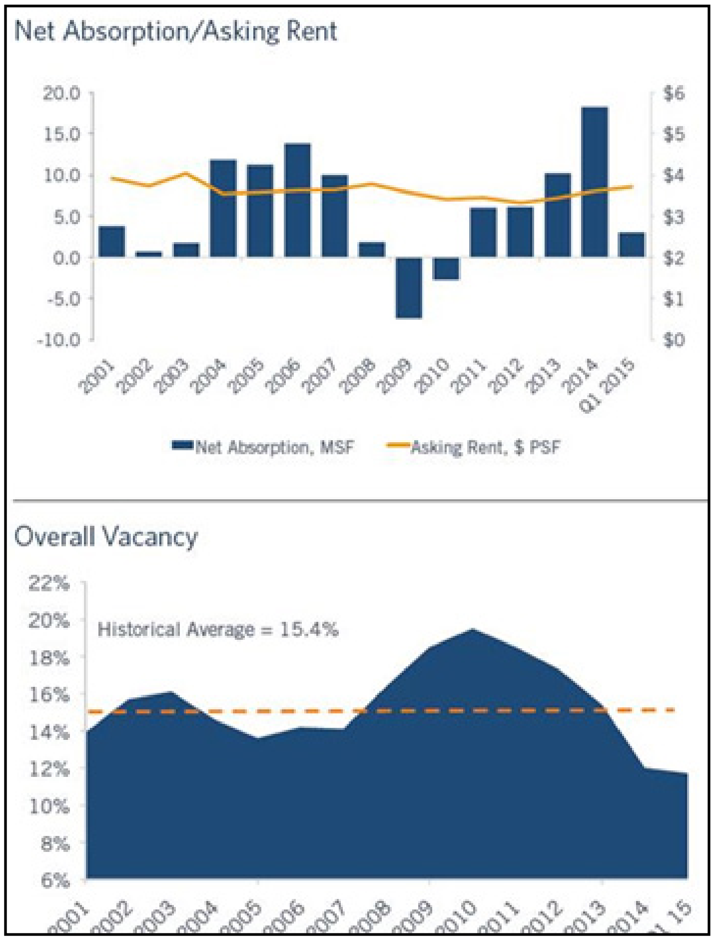
Source: CoStar; Strategic Planning Group, Inc.

In a more detailed analysis of leasable space in non-single user buildings, over 1 million sq. ft. of inventory exists, 32% (or 348,000 sq. ft.) of which is available. Most of the vacancy is in Class B space. Within Class A properties, there is a current vacancy of 17%.

ATLANTA INDUSTRIAL MARKET

Atlanta's industrial market was also impacted by the Great Recession, but began to recover in 2011. With lack of new inventory, vacancies have declined from historic levels and lease rates have begun to recover.

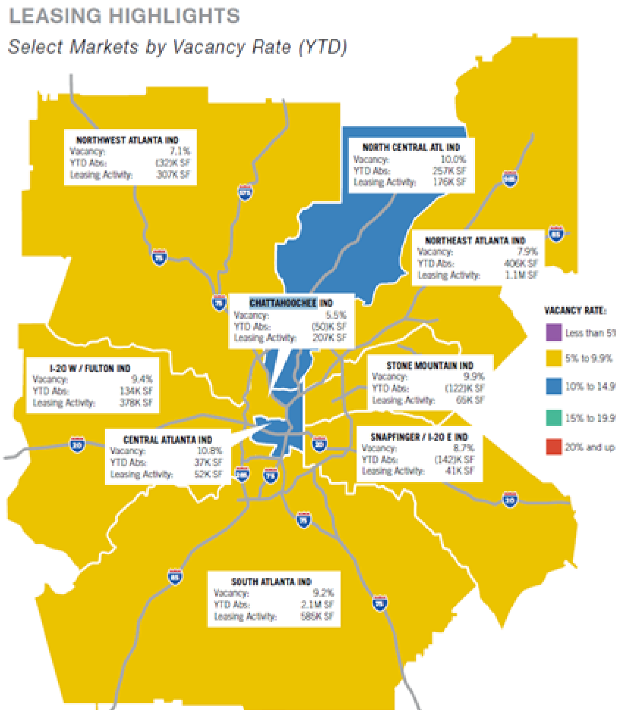
Figure 23: Atlanta Industrial Market.



Source: DTZ, 2015.

Johns Creek falls within the North Center Atlanta Industrial submarket. The North Center submarket is the largest of Atlanta's industrial submarkets, with an inventory of approximately 128 million sq. ft. The submarket has 257,000 sq. ft. of available space (10% vacancy).

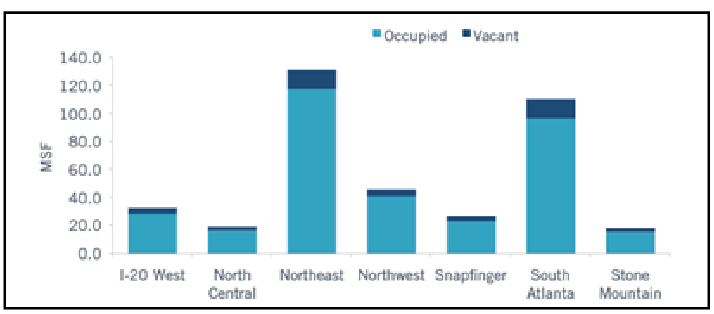
Figure 24: Atlanta Industrial Submarkets.



Source: NAI Brannen Goddard, 2015.

The two largest industrial submarkets are the Northeast and the South Atlanta markets.

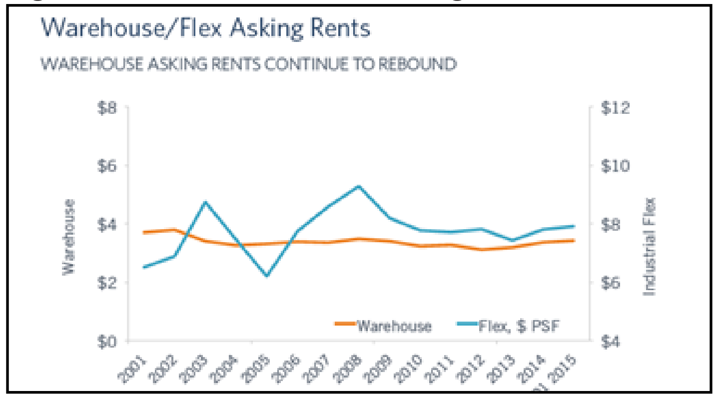
Figure 25: Atlanta Industrial Submarket Occupancy.



Source: DTZ, 2015.

As of the 1st Quarter 2015, warehouse lease rates are almost $4 per sq. ft. and flex space is $8 per sq. ft.

Figure 26: Warehouse/Flex Asking Rents.

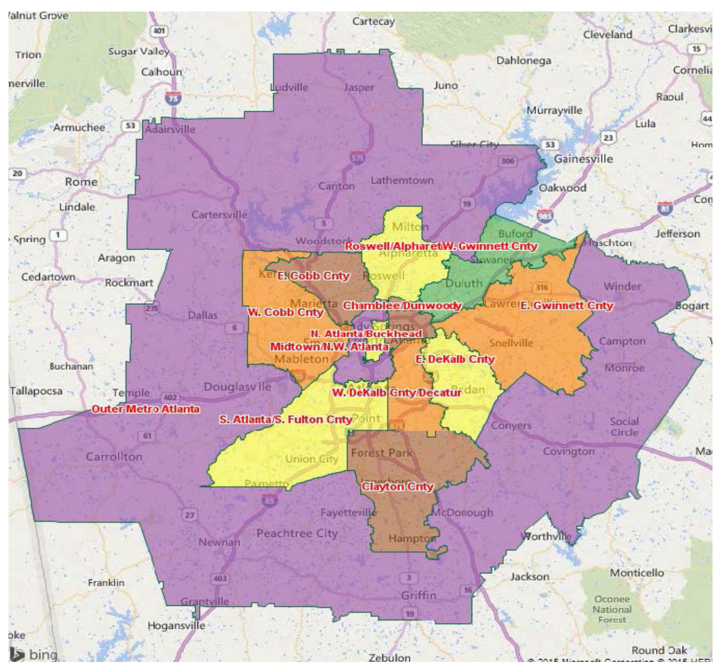


Source: DTZ, 2015.

RETAIL MARKET

Johns Creek falls within the Roswell/Alpharetta/West Gwinnett Retail Submarket.

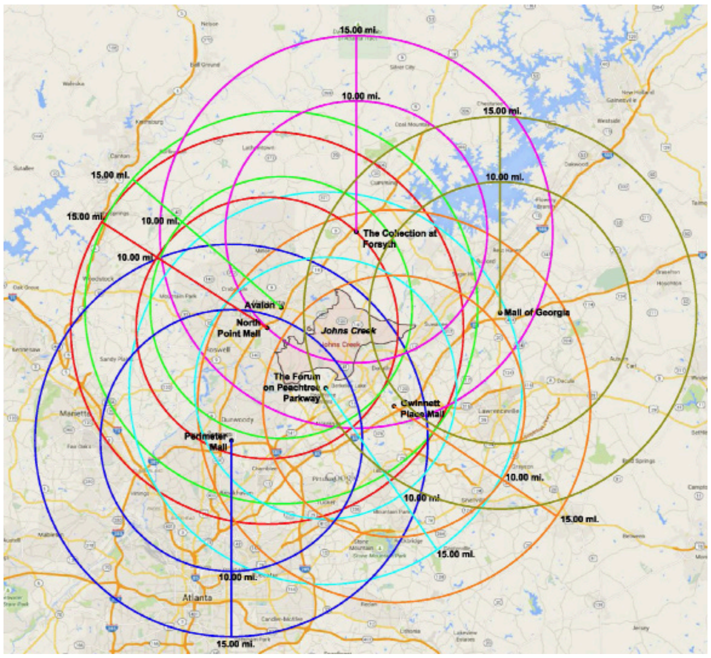
Figure 27: Atlanta Retail Submarkets.



Source: SavillsStudely, 2015.

Johns Creek lies within the primary and/or secondary markets of seven major regional retail centers: Avalon, Gwinnett Place Mall, Mall of Georgia, North Point Mall, Perimeter Mall, the Forum and the Collection at Forsyth. The following graphic shows Johns Creek's relative position to the surrounding regional retail center markets at 5, 10 and 15 mile radii.

Figure 28: Johns Creek Competitive Retail Shed.



Source: Strategic Planning Group, Inc., 2015.

SPG analyzed special retail market statistics from Nelson (Claritas) to determine what retail gaps exist within the City of Johns Creek. The following table summarizes the analyses (see appendix for details). Within a 5 mile radius of McGinnis Ferry Road and SR 141, there is an estimated retail gap of $1.1 billion. However as mentioned, the city falls within the larger retail markets of seven retail centers. At 10 miles, there is a net surplus of $3.8 billion, meaning there is more supply than demand (again showing the competition from the surrounding regional centers).

Table 3: Johns Creek Regional Retail GAP Analysis.

Retail Stores	5-Mile Radius Opportunity Gap/Surplus	10-Mile Radius Opportunity Gap/Surplus	15-Mile Radius Opportunity Gap/Surplus
Total Retail Sales & Eating, Drinking Places	$1,128,823,684	-$3,846,696,312	-$2,572,629,434
Motor Vehicle & Parts Dealers-441	$395,682,017	-$2,138,285,114	-$2,401,033,922
Furniture & Home Furnishings Stores-442	$50,464,705	-$24,208,917	-$32,676,404
Electronics & Appliances Stores-443	$12,377,213	-$53,924,513	-$77,832,156
Building Material, Garden Equipment Stores -444	$110,996,547	-$56,011,626	**$208,423,605**
Food & Beverage Stores-445	-$124,175,354	**$17,964,273**	**$465,833,583**
Health & Personal Care Stores-446	**$59,047,939**	**$44,987,893**	**$221,260,739**
Gasoline Stations-447	**$195,267,744**	**$64,576,734**	**$86,924,000**
Clothing & Clothing Accessories Stores-448	$133,591,222	-$90,711,510	**$85,879,210**
Sporting Goods, Hobby, Book, Music Stores-451	$36,027,760	-$10,152,727	**$79,929,196**
General Merchandise Stores-452	$221,072,996	-$124,989,748	**$263,774,667**
Miscellaneous Store Retailers-453	**$41,467,323**	**$73,538,750**	**$219,748,694**
Non-Store Retailers-454	$15,893,407	-$1,114,812,847	-$1,249,757,453
Foodservice & Drinking Places-722	-$18,889,835	-$434,666,962	-$443,103,193
GAFO *	$470,125,426	-$291,943,855	**$404,763,645**
General Merchandise Stores-452	$221,072,996	-$124,989,748	**$263,774,667**
Clothing & Clothing Accessories Stores-448	$133,591,222	-$90,711,510	**$85,879,210**
Furniture & Home Furnishings Stores-442	$50,464,705	-$24,208,917	-$32,676,404
Electronics & Appliances Stores-443	$12,377,213	-$53,924,513	-$77,832,156
Sporting Goods, Hobby, Book, Music Stores-451	$36,027,760	-$10,152,727	**$79,929,196**
Office Supplies, Stationery, Gift Stores-4532	$16,591,529	$12,043,560	**$85,689,132**

*GAFO (General Merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

Source: Claritas, Inc., 2015.

Based on CoStar data, Johns Creek had slightly over 655,000 sq. ft. of retail space and a vacancy of 12.3% in 2014.

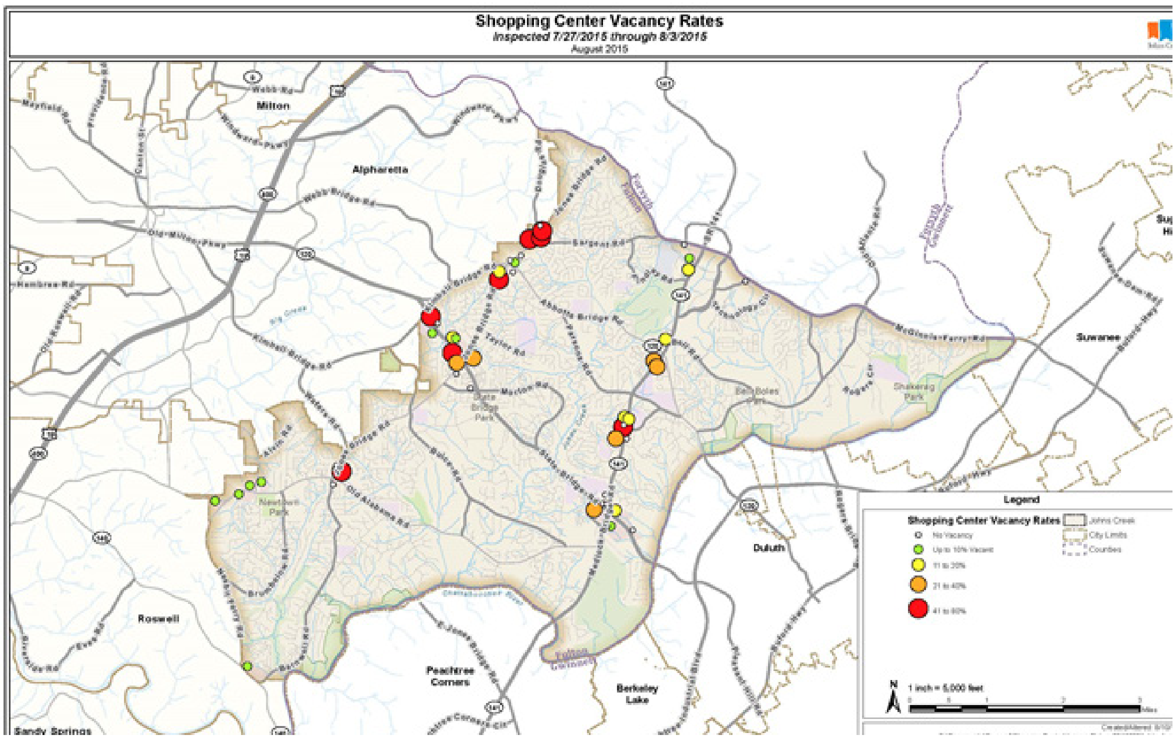
Table 4: Johns Creek Retail Inventory.

- 655,409 sq. ft. Retail (RBA), in 29 bldg.
- 80,608 sq. ft. Vacancy
- Vacancy Rate 12.3%
- Lease $14.85

Source: CoStar, City of Johns Creek, 2015.

The city analyzed its shopping centers during July 2015 and found a retail vacancy rate of 18%. As shown, the majority of shopping centers located in the western portion of the city are experiencing large vacancy rates (orange dots represent 21-40% vacancies and red represents 41-80% vacancies).

Figure 29: Johns Creek Shopping Center Vacancies.



Source: City of Johns Creek, 2015.

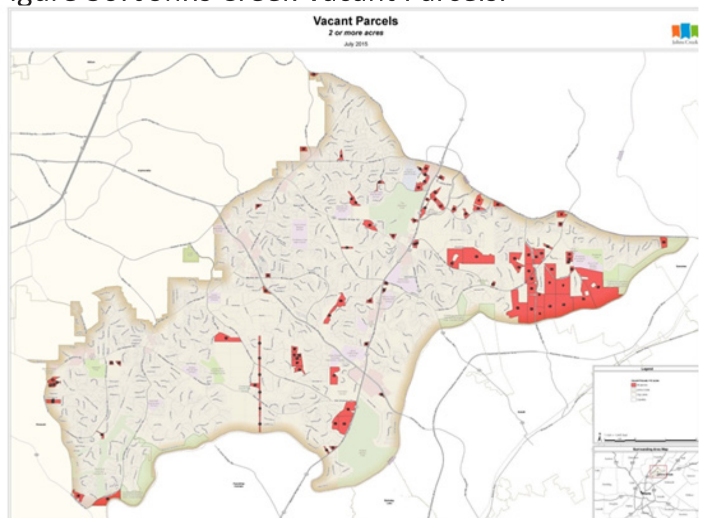
ECONOMIC DEVELOPMENT ISSUES IDENTIFICATION AND PRIORITIZATION *"WHICH DIRECTION SHOULD WE GO?"*

As stated in the city's Request for Proposal, "Johns Creek needs a strategy for addressing the economic needs of the entire city to assure continued and enhanced economic health, tax base expansion, quality job creation and support for municipal services." The economic challenges facing the city and the economy of the region mandate the need to diversify and expand the economic base in order to assure the future prosperity of the city and its residents. Specifically, there is a need to address the long-term pertinent challenges which the city faces including:

1. Limited availability of land – Few parcels of land are currently zoned and/or available for development, creating challenges in meeting prospect site needs in a largely "built out" community and creating cost issues.
2. Few economic incentives are currently available.
3. Redevelopment and revitalization needs and opportunities in the city.
4. Pipeline of employees for the workforce.

To continue to provide its citizens with the quality municipal services and facilities the city needs to be able to increase and diversify its revenue streams. Today, about 72% of its revenue is from property and sales taxes. The relative growth of both is threatened without major intervention on the part of local government. Technology Park is a major contributor to both sources of revenues, yet it is over 30 years old and its design as a 1980s suburban business campus is outdated. With limited undeveloped land, there are few options for redevelopment other than the Technology Park. Without structural changes, the existing Class A offices will become Class B, and the Class B will become Class C, resulting in a reduction in property taxes.

Figure 30: Johns Creek Vacant Parcels.



Source: City of Johns Creek, 2015.

WHY ECONOMIC DEVELOPMENT?

To achieve economic prosperity, the city needs new investments, increased public/private partnerships and increased high paying job creation. It also needs to maintain and protect the assets that have resulted in its reputation as one of Atlanta's premier communities (i.e. municipal services/facilities, quality education and high income households).

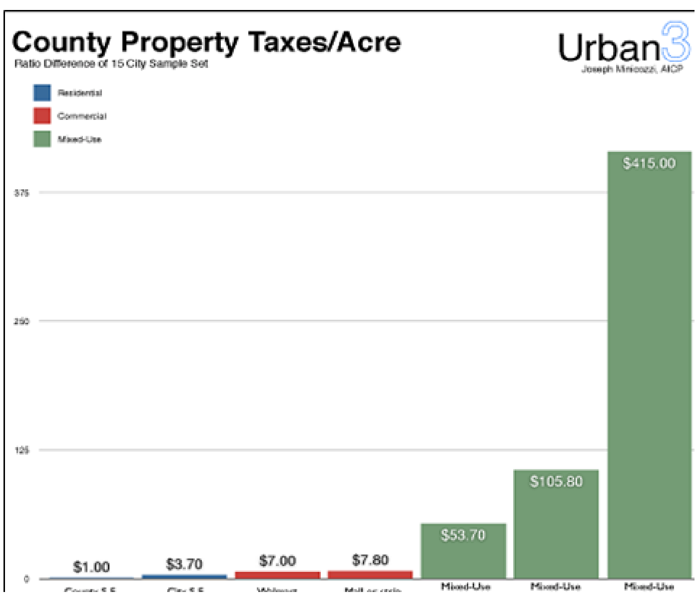
Figure 31: Reasons for Johns Creek Strategic Economic Development Plan.

1. **Increasing and sustaining the City tax base**
   - **Property Taxes - 36%**
   - **Sales Taxes - 36%**
   - **Franchise Fees - 9%**
2. **Increasing private and corporate investments**
3. **Increasing opportunities for public and private partnerships (3Ps)**
4. **Job creation in appropriate business/industry sectors**
5. **Maximizing sustainable economic growth and viability of the City of Johns Creek**

Source: Strategic Planning Group, Inc., 2015.

Given the city's limited undeveloped land, it is important to analyze property tax revenue in terms of revenue per acre versus revenue per parcel. Municipalities throughout the United States have begun to analyze revenue potential on an acre basis. Simply stated, parcels of land with mixed use or high intensity generate more revenue, which can more easily be seen in the following graphics. In a major revenue study by Urban3 comparing 15 different cities, a single family home generated $3.70 in general funds per acre while a Walmart generated $7 per acre. This compared to $53 per acre for a two story mixed-use building (over 7x higher than a Walmart), or almost $106 per acre for a 3 story mixed-use development. The study found that a six story mixed-use development generated $415 per acre, the equivalent of 1,200 single family homes or 59 Walmarts.

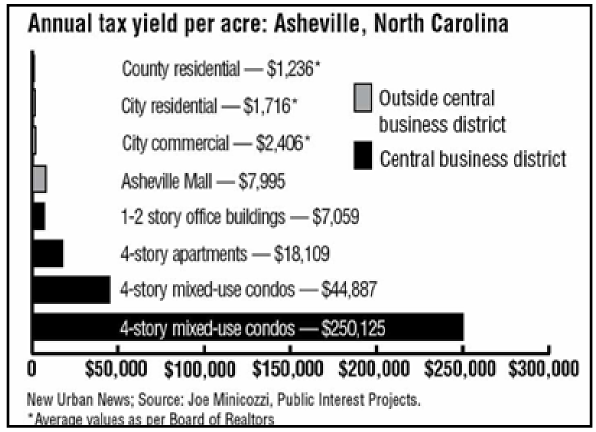
Figure 32: Comparison of Revenue Generation by Acre.



Source: Urban 3, 2015.

In an analysis for Asheville, North Carolina, the annual tax yield per acre showed similar results.

Figure 33: Revenue per Acre, Asheville.



Revenues and job creation are also higher on a development acre basis. A more recent study of Asheville, North Carolina, demonstrated that a Walmart on 34 acres generated only $6,500 per acre in total county/city taxes and $47,500 in sales taxes per acre compared to a six story downtown mixed-use development on 0.2 acre which generated $634,000 in property taxes per acre and $83,600 in sales tax per acre (176% more than the Walmart).

Figure 34: Comparison of Development Types by Acre Revenue.

	ASHEVILLE WALMART	DOWNTOWN MIXED-USE
Land Consumed (acres):	34.0	00.2
Total Property Taxes per Acre:	$6,500	$634,000
Retail Taxes* per Acre to City:	$47,500	$ 83,600
Residents per Acre:	0.0	90.0
Jobs per Acre:	5.9	73.7

*Estimated from public reports of annual sales per sq.ft..

Urban3

TARGET INDUSTRY PROCESS

In having a discussion on the appropriate target industries for Johns Creek, it is important to provide some perspective regarding the correlation between the target industries identified for the Atlanta Region, Fulton County and the City of Johns Creek Strategic Economic Development Plan (SEDP). The recommendations in the SEDP were developed to complement target industries already identified in the region. Economic development staffs seek out target industries usually in conjunction with regional economic development agencies, state economic development agencies and large utility providers through hosting site selection events and by attending target industry related national and regional trade shows.

Communities can and should work to influence the target industry decision makers to invest in a community by providing the right data and having that data organized and made easily understandable. This data should be available on the web and efforts need to be made to meet with regional commercial real estate brokers to update the data and to assist with broker needs.

TARGET INDUSTRIES

Target industry businesses bring quality job growth to a community, thus making a significant economic contribution. Most communities use a measurement of paying an average annual wage that is at least 115/125 percent of a state, metropolitan statistical area (MSA), or local average wage in order to qualify for a target industry job creation incentive. Communities select the types of target industries that aid in providing economic diversification, pay higher wages, retain young professionals, enhance economic growth, meet a variety of skill sets and leverage local assets and infrastructure.

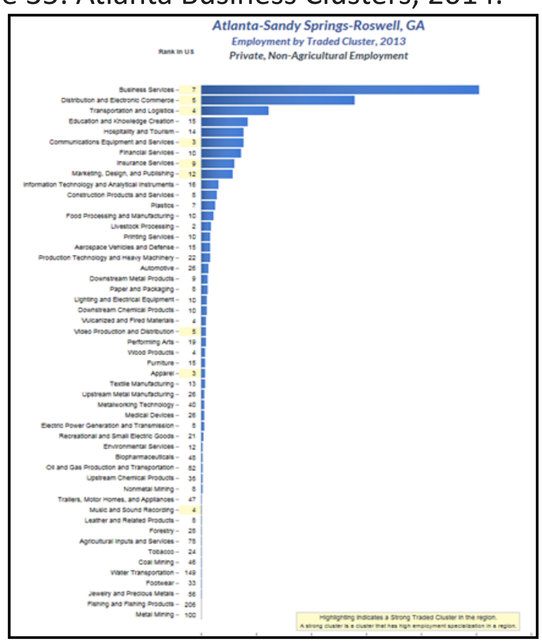
Numerous economic development groups, including state, regional and county organizations within the overall market area, have prepared detailed target industry studies that can directly assist the city in its economic development efforts. Most of the industries discussed below are referred to as "Target Industries" which for this report means "value added". A city, unlike a state, region or county, is more dependent on property taxes for revenue. Therefore, a city's target industries or businesses also may include retail.

REVIEW OF EXISTING TARGET INDUSTRIES

State of Georgia

Site Selection Magazine, an important data source for site selectors and economic development professionals, gave the State of Georgia a first-place finish in Site Selection's ranking of state business climates for 2014 (the latest ranking) and for 2013. The magazine notes that the state has been a strong performer for several years, thanks in part to its Quick Start workforce training program, logistics infrastructure and economic development leadership, among other factors.

Figure 35: Atlanta Business Clusters, 2014.



Source: Harvard Business School, 2014.

Atlanta Region

The Institute for Strategy and Competitiveness at Harvard's Business School has been studying the nation's major metropolitan areas (MSAs) as to each area's competitive business clusters. As shown in the graphics below, the Atlanta region (Atlanta-Sandy Springs-Roswell MSA) shows a high concentration of employment in ten major sectors:

1. Business Services
2. Distribution and Electronic Commerce
3. Transportation and Logistics
4. Education and Knowledge Creation
5. Hospitality and Tourism
6. Communications Equipment and Services
7. Financial Services
8. Insurance Services
9. Marketing, Design, and Publishing
10. Information Technology and Analytical Instruments

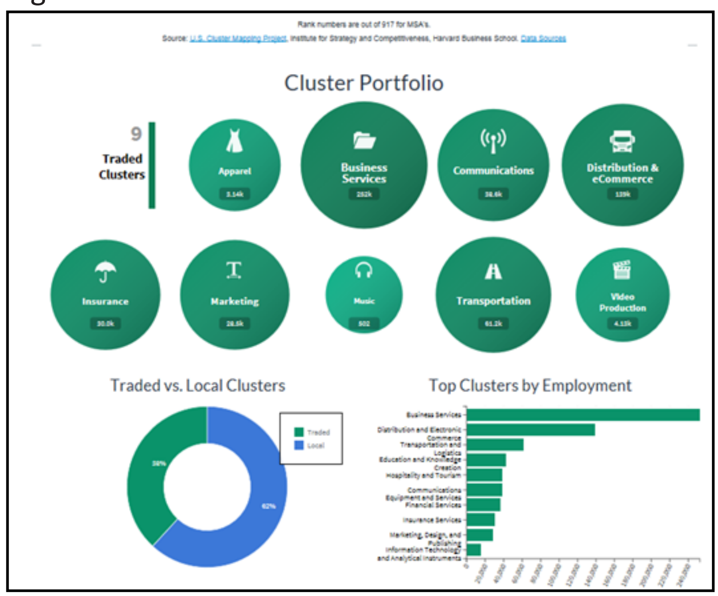
While these concentrations of employment are important, they are not in themselves considered true business clusters, which compete on a national/regional scale (import revenues from outside of Atlanta/Georgia) and are considered as major target sectors.

Business clusters are important in developing employment and target industry strategies. Studies about what businesses consider in site location have shown that the presence of businesses similar to theirs (clusters) was a consideration when selecting a site. Brookings Institution has shown that "strong clusters foster innovation through dense knowledge flows and spillovers, strengthen entrepreneurship by boosting new enterprise formation and start-up survival, enhance productivity, income levels, and employment growth in industries, and positively influence regional economic performance."

The major target clusters for the Atlanta MSA are identified as the following:

1. Apparel, ranked 3rd nationally
2. Communication Equipment and Services, ranked 3rd nationally
3. Music and Sound Recording
4. Transportation and Logistics, ranked 4th nationally
5. Distribution and Electronic Commerce, ranked 5th nationally
6. Video Production and Distribution, ranked 5th nationally
7. Business Services, ranked 7th nationally
8. Insurance Services, ranked 9th nationally
9. Marketing, Design and Publishing, ranked 9th nationally

Figure 36: Atlanta Cluster Porttfolio.



Source: Harvard University, 2014.

The Atlanta Regional Commission (representing Cherokee, Clayton, Cobb, DeKalb, Douglas, Fayette, Fulton, Gwinnett, Henry and Rockdale Counties) has identified the four (4) employment hubs and following target industries that comprise 4 major hubs and 16 business sectors to target.

Knowledge Hub
- Information Technology
- Telecommunications
- Corporate and Regional Headquarters
- Professional Services
- Corporate and Customer Support Operations

Logistics Hub
- Supply Chain Management
- Transportation Services
- Warehousing and Storage
- Wholesale Trade

Production Hub
- Paper, Plastics, and Chemicals
- Transportation Equipment
- Metal and Metal Products
- Computer, Electronic, and Electrical Equipment

Entertainment Hub
- Film, Music, and Television
- Arts and Entertainment
- Hospitality

Figure 37: Atlanta Region Target Industries.

Source: Atlanta Regional Commission.

Fulton County Target Industries

The Fulton County Economic Development Division lists seven (7) target industry sectors:
- Aerospace Logistics & Transportation
- Clean Technologies
- Life Sciences
- Energy & Environment Information
- Technology
- Financial Services
- Logistics and Transportation

DeKalb County Target Industries

DeKalb County has identified six (6) target business sectors:
- Health & Life Sciences
- Logistics & Distribution
- Professional & Business Services
- Tourism Services & Tour Packages
- Construction & Industrial Supplies
- Advanced Manufacturing

Cobb County Target Industries

Cobb County has identified seven (7) target business sectors:
- Aerospace and Advanced Equipment Manufacturing
- Information Technology and Software
- Professional and Business Services
- Wholesale Trade and Logistics
- Health Care Services
- Travel and Tourism
- Bioscience

The following cities within the North Fulton Market are described below:

Sandy Springs Target Industries

Sandy Springs, located within and north of the Atlanta perimeter, is the second largest city in the Atlanta MSA. Incorporated in 2005, the city is home to the MSA's largest office market with 29 million sq. ft. of office space. It is primarily focusing on four target sectors:

- Medical and Biotechnology
- Business Services and Logistics
- Technology
- Small Businesses

In addition, Google has recently announced Sandy Springs as one of its Google Fiber cities. Google is building an ultra-high-speed broadband network delivering 1 gigabit per second connections. Mercedes Benz has also announced it will locate its North American Headquarters in the city and employ over 1,000 people.

City of Roswell Target Industries

The City of Roswell, which borders the City of Johns Creek to the northwest, is an older city located on Highway 400 and is largely built-out. Its economic development efforts focus is on four (4) target sectors:

- Small Business & Professional Services
- Restaurant Industry
- Healthcare
- Logistics

City of Alpharetta Target Industries

The City of Alpharetta, which borders Johns Creek to the west, has over 600 technology companies, and more than 20 million square feet of office space. Unlike its surrounding communities, Alpharetta is not built out and has ample vacant land to expand. The city is focused on industrial development and is not seeking major residential construction. The city's top target industry sectors are:

- Corporate and Regional Headquarters
- Information Services
- Telecommunications
- Healthcare IT
- Retail Trade

JOHNS CREEK TARGET INDUSTRIES OVERVIEW

The following chart highlights the critical requirements that Site Selector's view as the most important locational criteria when looking to move or expand to a new location. Site location studies are highly competitive by nature, both at the regional level and the local or city level. Today, Johns Creek competes with Alpharetta, Sandy Springs, Roswell and Peachtree Corners for jobs. From a competitive standpoint, the city does not have strong competitive transportation access, nor the same broadband facilities and redundancy as its competition. While the city is largely built out, its existing office and industrial market is competitive and in most cases, less expensive than its competition. As discussed earlier, the city does have a large amount of vacant office/industrial space, but little vacant developable land.

What Matters Most: Site Selectors' Most Important Location Criteria

Rank	Location Factor
1	Transportation infrastructure
2	Ease of permitting and regulatory procedures
3	Existing workforce skills
4	Land/building prices and supply
5	Utility infrastructure
6	State and local tax scheme
7	Flexibility of incentive programs
8	Availability of incentives
9	Access to higher education resources
10	Legal Climate (tort reform)

Source for the above charts:
Site Selection survey of corporate real estate executives, October 2014

Based on business licenses, Johns Creek has 2,573 businesses within its boundaries. Most of the businesses provide services to residents and other businesses within the city, are not primary industries, and therefore are not considered targeted clusters. While the city does not have true industry clusters, it does have several large and nationally prominent businesses like Alcon which manufactures a significant portion of the nation's contact lenses.

Technology Park at Johns Creek

The economic platform for what is now Johns Creek had its beginning with the development of the Technology Park at Johns Creek in 1981. The park, which falls within both Fulton and Forsyth counties, contains approximately 1,900 acres and has over 10,000 workers.

The portion of the Technology Park located within the City of Johns Creek contains over 3 million sq. ft. of office and 913,000 sq. ft. of industrial space. Major tenants include: Alcon, State Farm's southern regional headquarters, SAIA, World Financial Group, Nordson Corporation and Emory Johns Creek Hospital. Ebix, Inc. is a leading international supplier of on-demand software and e-commerce services to the insurance industry. They recently purchased an 11.6 acre, 100,000 sq. ft. office complex (within the Technology Park) where it will consolidate and expand its workforce. The company moved to Johns Creek from Sandy Springs. Factors concerning its

Table 5: Johns Creek Businesses by 2 Digit NAICS code. Source: U.S. Department of Commerce, 2015.

Geographic area name	2007 NAICS code	Meaning of 2007 NAICS code	Meaning of Type of operation or tax status code	Year	Number of employer establishments	Employer value of sales, shipments, receipts,	Annual payroll ($1,000)
Johns Creek	31-33	Manufacturing	Total	2007	11	D	D
Johns Creek	42	Wholesale trade	Merchant	2007	70	327,764	20,280
Johns Creek	44-45	Retail trade	Total	2007	161	409,183	47,333
Johns Creek	51	Information	Total	2007	32	N	10,567
Johns Creek	53	Real estate and rental and leasing	Total	2007	107	67,464	17,090
Johns Creek	54	Professional, scientific, and technical services	All	2007	446	257,252	95,134
Johns Creek	54	Professional, scientific, and technical services	Establishments	2007	446	257,252	95,134
Johns Creek	56	Administrative and support and waste	Total	2007	108	171,616	116,963
Johns Creek	61	Educational services	All	2007	41	31,102	8,889
Johns Creek	61	Educational services	Establishments	2007	38	29,658	8,263
Johns Creek	61	Educational services	Establishments	2007	3	1,444	626
Johns Creek	62	Health care and social assistance	All	2007	123	77,551	27,802
Johns Creek	62	Health care and social assistance	Establishments	2007	121	D	D
Johns Creek	62	Health care and social assistance	Establishments	2007	2	D	D
Johns Creek	71	Arts, entertainment, and recreation	All	2007	24	D	D
Johns Creek	71	Arts, entertainment, and recreation	Establishments	2007	21	26,075	12,203
Johns Creek	71	Arts, entertainment, and recreation	Establishments	2007	3	D	D
Johns Creek	72	Accommodation and food services	Total	2007	112	85,317	26,576
Johns Creek	81	Other services (except public administration)	All	2007	99	41,262	13,534
Johns Creek	81	Other services (except public administration)	Establishments	2007	91	D	D
Johns Creek	81	Other services (except public administration)	Establishments	2007	8	D	D

D Withheld to avoid disclosing data for individual companies; data are incl

f 500 to 999 employees
N Not available or not comparable
b 20 to 99 employees
e 250 to 499 employees
c 100 to 249 employees
a 0 to 19 employees

move involved the availability and cost of a vacant LEED Gold certified building, and the location of its labor shed. Another major firm located within Johns Creek but outside the Technology Park is Macy's System Technology.

The 2007 Economic Census data is the latest data available for the City of Johns Creek and is shown below. Data on the 2012 Economic Census is just starting to be released. However, data on manufacturing is the only data currently available. Economic Census data from 2012 indicates that the city gained an additional 3 manufacturing companies for a total of 14 companies. Other than the number of firms, all other data on manufacturing within the city has been suppressed.

Using the city's business license data, Strategic Planning Group (SPG) analyzed Johns Creek's businesses by NAICS code. As shown below, the city has 2,731 business establishments of which the largest is in six sectors: Professional Services, Health Care, Finance/Insurance, Retail Trade, Other Services and Construction.

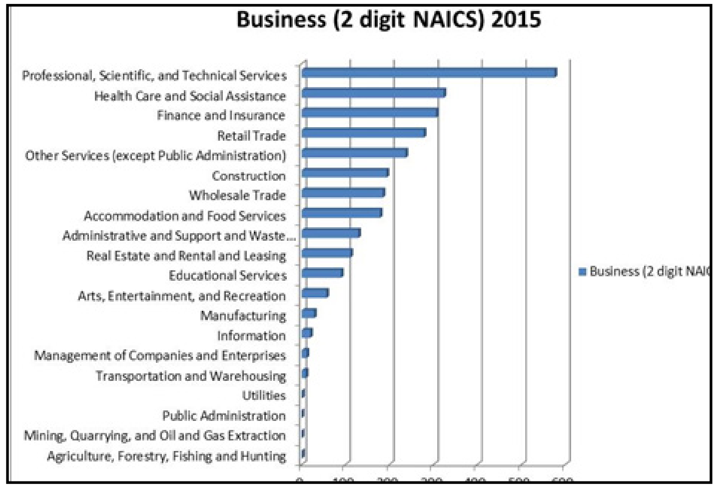
Table 5: Johns Creek Businesses by 2 Digit NAICS code.

Sector	Description	Number of Establishment
11	Agriculture, Forestry, Fishing and Hunting	
21	Mining, Quarrying, and Oil and Gas Extraction	-
22	Utilities	
23	Construction	19
31-33	Manufacturing	2
42	Wholesale Trade	18
44-45	Retail Trade	27
48-49	Transportation and Warehousing	
51	Information	1
52	Finance and Insurance	30
53	Real Estate and Rental and Leasing	11
54	Professional, Scientific, and Technical Services	57
55	Management of Companies and Enterprises	1
56	Administrative and Support and Waste Management and Remediation Services	12
61	Educational Services	9
62	Health Care and Social Assistance	32
71	Arts, Entertainment, and Recreation	5
72	Accommodation and Food Services	17
81	Other Services (except Public Administration)	23
92	Public Administration	-

Source: US Department of Commerce, 2015.

As discussed above, the city's core businesses are professional, scientific, and technical services followed by health care, finance and insurance, and retail.

Figure 38: Johns Creek Businesses by NAICS code.



Source: US Department of Commerce, 2015.

SPG analyzed the city's economic base, strengths, weaknesses and opportunities with respect to regional employment growth and state, regional, and other competitive city target industries to determine specific target opportunities for Johns Creek.

RECOMMENDED JOHNS CREEK TARGET INDUSTRIES

Johns Creek Target Industry Process

Figure 39: Target Industry Process.

Johns Creek's primary assets are its quality of life and reputation as one of the highest income and amenity communities in Atlanta, if not the Southeast. Equally important to the city's economic development efforts is the Technology Park at Johns Creek, which is home to financial and data service providers. City residents are highly educated and have prompted a national ranked school system.

Because of Johns Creek's existing office vacancies and office turnover rate, SPG recommended targeted industries are primarily those businesses that occupy office space.

Based on these factors, SPG recommends the following:

- High Technology Industries
- Information Technology
- Software
- Financial Services
- Medical Technology
- Professional Services

Figure 40: Johns Creek Target Industries.

Source: Strategic Planning Group, Inc., 2015.

Office Users

Employment in major office using sectors include: financial services, information and professional and business services. Recently, one of the more important developments for office markets across the U.S. has been the revival of the **financial services** sector.

Technological and creative sectors have represented another significant employment driver and are referred to as the TAMI sectors—technology, advertising, media and information. There has been a major change in office users over the last ten years. Changes in internal office space layouts has resulted in a more open format resulting in more employees per sq. ft. and an increase in parking space ratios if the office is not linked to transit or walk/live neighborhoods. The second change, attributed to the millennial generation, is the desire to work near transit stations, creating a live/work/shop environment. Thirdly, office buildings which were designed to be located in landscaped campus environments now desire high visibility and quick access.

Johns Creek Economic Recruitment

SPG recommends four levels or platforms to increase employment opportunities within the city. First, what are primary targeted business sectors that are prime users of office space? Second, JCA should continue to work with existing businesses as well as commercial real estate brokers to retain existing businesses and attract regional business not identified as "targets" but nonetheless are suited to fill vacancies as they become available. Third, work with at least two of your existing international companies (or their parent companies) to bring more of their business portfolio to the city and/or to identify linked businesses (forward and backward linked businesses) that might want to relocate due to their working relationships with those primary firms. Fourth, strengthen the city's retail network.

PRIMARY TARGET BUSINESSES/FIRST TIER

SPG analyzed primary office users and screened prospective business sectors (NAICS) as to growth potential (national and within the State of Georgia), the degree of existing sectors currently located in the city, and typical size of the business establishments. To a large degree, most of the target industries can be classified as falling within the North American Industry Classification System with the exception of Software (NAICS 5112) and Finance & Insurance (NACIS 5231/5239). Most of the identified recruiting sectors are (NAICS) Super sector 54: Professional and Business Services. Detail business profiles are found in the Appendix.

The Atlanta market dominates the state's overall economy. Because of data suppression and the fact that the 2012 Economic Census data is not available for Georgia, its counties, or local levels, this analysis focuses on other Census data at the state level, which should be representative of the Atlanta market.

2012 NAICS: 5112 - Software publishers.

This sector is one of the fastest growing nationally as well as within Georgia. With the location of Ebix, there is a chance to grow this sector. One caution is that the millennials make up a large segment of this sectors employment base and there has been a trend for this demographic to locate in downtown mixed use areas, promoting the work/live/play environment. Johns Creek does have a strong existing software presence in Macys, Ebix and other local firms.

Within Georgia, this sector has a large number of firms that employ between 10 and 100 workers, which fits Johns Creek's current inventory needs.

- 51 - Information
  - 511 - Publishing industries (except internet)
    - 5112 - Software publishers
      - 51121 - Software publishers
        - 511210 - Software publishers

2012 NAICS: 5231/5239 - Securities and commodity contracts intermediation and brokerage/other financial investment activities.

This sector is footloose, meaning that it has the ability to locate anywhere within a geographic area. It has experienced significant growth nationally. Within Georgia it has recovered from the impact of the Great Recession and payrolls have shown significant growth. While most firms are small, there are still a large number of firms in the 10-49 employee size. Principals and professional staff within these firms have the income to appreciate and afford the Johns Creek market.

- 52 - Finance and insurance
  - 523 - Securities, commodity contracts, and other financial investments and related activities
    - 5231 - Securities and commodity contracts intermediation and brokerage
      - 52311 - Investment banking and securities dealing
        - 523110 - Investment banking and securities dealing
      - 52312 - Securities brokerage
        - 523120 - Securities brokerage
      - 52313 - Commodity contracts dealing
        - 523130 - Commodity contracts dealing
      - 52314 - Commodity contracts brokerage
        - 523140 - Commodity contracts brokerage

2012 NAICS: 5415 - Computer systems design and related services[1].

Subsector 5415 has one (1) five digit subsector and four (4) six digit subsectors. This sector has experienced significant growth at the national level. Within Georgia, it has experienced some growth in the number of establishments while employment has rebounded from its 2009 high. Johns Creek currently has 157 firms within this sector.

[1] Example is Macy's.

- 54 - Professional, scientific, and technical services
  - 541 - Professional, scientific, and technical services
    - 5415 - Computer systems design and related services
      - 54151 - Computer systems design and related services
        - 541511 - Custom computer programming services
        - 541512 - Computer systems design services
        - 541513 - Computer facilities management services
        - 541519 - Other computer related services

2012 NAICS: 5416 - Management, scientific, and technical consulting services.

Subsector 5416 has three (3) five digit subsectors and seven (7) six digit subsectors. Nationally, this sector experienced a 29% employment growth between 2007 and 2012. Within Georgia, this sector has experienced solid growth. Johns Creek currently has 169 establishments in the four digit sector Establishments within this sector are traditionally small (1-4), with a national average of 6.6 employees per establishment.

- 54 - Professional, scientific, and technical services
  - 541 - Professional, scientific, and technical services
    - 5416 - Management, scientific, and technical consulting services
      - 54161 - Management consulting services
        - 541611 - Administrative management and general management consulting services
        - 541612 - Human resources consulting services
        - 541613 - Marketing consulting services
        - 541614 - Process, physical distribution, and logistics consulting services
        - 541618 - Other management consulting services
      - 54162 - Environmental consulting services
        - 541620 - Environmental consulting services
      - 54169 - Other scientific and technical consulting services
        - 541690 - Other scientific and technical consulting services

2012 NAICS: 6211 - Offices of Physicians.

Subsector 6211 has one (1) five digit subsector and two (2) six digit subsectors. Nationally, this sector's establishments had a 6% growth rate between 2007-2012, as well 7.6% growth in employees. Currently, Johns Creek has 65 establishments within this sector. Unlike a lot of the other four digit sectors, NAICS 5416 establishments are larger; averaging 10.6 employees per office.

- 62 - Health care and social assistance
  - 621 - Ambulatory health care services
    - 6211 - Offices of physicians
      - 62111 - Offices of physicians
        - 621111 - Offices of physicians (except mental health specialists)
        - 621112 - Offices of physicians, mental health specialists

SECOND TIER TARGETS

Johns Creek has 2,731 business establishments within its boundaries and it is reported that the Technology Park alone has over 10,000 employees. For that reason, it is critical that the city use some of its resources to maintain occupancy at the Park, which currently has vacant space. It is normal for office parks to experience tenant turn over. This second tier of target industries is focused on filling vacancies over the study period. Its primary focus is on professional, scientific, and technical services as well as financial and insurance establishments, all of which are predominately office users. For purposes of this analysis, those establishments that are considered first tier prospects have not been duplicated.

2012 NAICS: 54 - Professional, scientific, and technical services.

Professional Services represents the NAICS Subsector: 541 professional, scientific and technical services. It is further defined into nine subsectors: Nationally, professional, scientific and technological firms were impacted by the Great Recession but had rebounded by the time of the 2012 Economic Census. While the number of businesses had a negligible increase, revenue and other indicators demonstrated strong growth.

- 54 - Professional, scientific, and technical services
  - 541 - Professional, scientific, and technical services
    - 5411 - Legal services
    - 5412 - Accounting, tax preparation, bookkeeping, and payroll services
    - 5413 - Architectural, engineering, and related services
    - 5414 - Specialized design services
    - 5415 - Computer systems design and related services
    - 5416 - Management, scientific, and technical consulting services
    - 5417 - Scientific research and development services
    - 5418 - Advertising, public relations, and related services
    - 5419 - Other professional, scientific, and technical services

Professional/Business Services

For the purpose of this study, SPG focused on the following Professional Service sectors:

This NAICS subsector represents a major portion of Johns Creek businesses. While it is important to continually recruit within this Sector, only two (2) four digit NAICS sectors are recommended for targeting.

Business Services

NAICS 5411
NAICS 5412
NAICS 5413

Research & Technical Consulting

NAICS 5417

2012 NAICS: 5411 - Legal services.

At the national level, legal services are going through a transition as a result of changes in technology, which has reduced the number of support staff in most firms. Today, firms require less space and are looking to both downsize and reduce occupancy costs, which could favor Johns Creek. Johns Creek has 27 firms that fall within this sector.

Overall, Legal Services has recovered from the Great Recession and the number of employees and payroll has rebounded. This sector is dominated by small firms (1-4 employees). The number of employee establishments in Georgia (and nationally) is larger than employer establishments. Most non-employers are self-employed individuals operating unincorporated businesses (known as sole proprietorships), which may or may not be the owner's principal source of income. While larger firms will seek locations in downtown Atlanta or along the Perimeter Beltway for visibility and access, smaller firms are more footloose and affected by individual business and partner location desires and wishes can be impacted by quality of life issues including proximity to home.

- 54 - Professional, scientific, and technical services
  - 541 - Professional, scientific, and technical services
    - 5411 - Legal services
      - 54111 - Offices of lawyers
        - 541110 - Offices of lawyers
      - 54119 - Other legal services
        - 541191 - Title abstract and settlement offices
        - 541199 - All other legal services

2012 NAICS: 5412 - Accounting, tax preparation, bookkeeping, and payroll services.

At the national level, this sector has shown a 3% growth in the number of establishments and a 5.2% growth in employment according to the 2012 Economic Census. At the state level however, this sector was significantly impacted by the Great Recession and is just now rebounding. Johns Creek currently has 33 businesses that fall within this sector. Like Sector

5411, these establishments are footloose and payroll within Georgia average about $55,000. While most firms are small (1-4 employees), there are a large number of establishments in the 5-19 employee size.

- 54 - Professional, scientific, and technical services
  - 541 - Professional, scientific, and technical services
    - 5412 - Accounting, tax preparation, bookkeeping, and payroll services
      - 54121 - Accounting, tax preparation, bookkeeping, and payroll services
        - 541211 - Offices of certified public accountants
        - 541213 - Tax preparation services
        - 541214 - Payroll services
        - 541219 - Other accounting services

2012 NAICS: 5413 - Architectural, engineering, and related services.

This sector was decimated by the Great Recession and is just now rebounding. Within Georgia, employment is increasing and the average payroll is $68,000. The sector is footloose, educated and employees have incomes that could support living in Johns Creek. The city currently has 26 firms within this sector.

- 54 - Professional, scientific, and technical services
  - 541 - Professional, scientific, and technical services
    - 5413 - Architectural, engineering, and related services
      - 54131 - Architectural services
        - 541310 - Architectural services
      - 54132 - Landscape architectural services
        - 541320 - Landscape architectural services
      - 54133 - Engineering services
        - 541330 - Engineering services
      - 54134 - Drafting services
        - 541340 - Drafting services
      - 54135 - Building inspection services
        - 541350 - Building inspection services
      - 54136 - Geophysical surveying and mapping services
        - 541360 - Geophysical surveying and mapping services
      - 54137 - Surveying and mapping (except geophysical) services
        - 541370 - Surveying and mapping (except geophysical) services
      - 54138 - Testing laboratories
        - 541380 - Testing laboratories

2012 NAICS: 5417 - Scientific research and development services.

Nationally, this sector grew by 5 percent from 2007 to 2012 according to the U.S. Economic Census. During that time, employment fell by 11 percent indicating more efficiency and technology utilization. Within Georgia, this sector is growing and employment is leveling off. Average payroll is approximately $70,000. Johns Creek has three (3) firms in this sector.

- 54 - Professional, scientific, and technical services
  - 541 - Professional, scientific, and technical services
    - 5417 - Scientific research and development services
      - 54171 - Research and development in the physical, engineering, and life sciences
        - 541711 - Research and development in biotechnology
        - 541712 - Research and development in the physical, engineering, and life sciences (except biotechnology)
      - 54172 - Research and development in the social sciences and humanities
        - 541720 - Research and development in the social sciences and humanities

Third Tier Targets

Johns Creek has the good fortune to have several national and international firms located within the city.

Novartis International

Novartis International AG, is a large Swiss conglomerate consisting of seven major companies. In addition to Alcon, Norvartis owns Novartis Animal Health, Novartis Diagnostics, Novartis Oncology, Novartis Vaccines and Sandoz. As owner of Alcon, the corporation has a large investment in Johns Creek. When Alcon moved its headquarters to Dallas/Fort Worth, it left +/- 80,000 sq. ft. of vacant space within its old headquarter building, which Novartis is actively working to fill.

Another major reason for targeting Novartis is that pharmaceuticals is one of the few sectors still drawn to the older campus suburban office model.

Johns Creek could take a more proactive approach (at the mayor level) and reach out to Novartis to see what the city could do to assist in filling the vacant space within the headquarter building, as well as market the Technology Park as a future site for other Novartis businesses. Johns Creek has the quality of life factors that should be attractive to Novartis, AG. It should also work with Novartis to determine if any of its suppliers or clients (forward or backward linkages) should be targeted. One example would be robotics firms whose products are used by Alcon or are servicing and maintaining them.

As an international firm, it should be consulted with to determine if other Swiss or European firms might be interested in reverse investment in Technology Park.

Ebix

Ebix is a large global provider of software and e-commerce services to the insurance and medical sectors and has a large presence in India. Once it is firmly operational in Johns Creek, the city (again at the mayoral level) should take a proactive approach to determine if any of Ebix's forward/backward linkage firms are suitable for Johns Creek, as well as explore the possibility of targeting other companies from India to Johns Creek.

Fourth Tier Targets/Retail

Retail is the last tier for targeting. The city is within the primary market of several regional type shopping centers and is reported to have a high turnover rate. Shopping centers located within the western portions of the city are experiencing high vacancy rates. Filling retail space is usually the providence of the shopping center management firm and commercial brokers. However, this is one area that a city can take a proactive approach to marketing by taking their "product" (i.e. shopping center space to national retailer events like the annual ICSC conference in Las Vegas). SPG believes that using this approach is premature until the city has more destination oriented product that has been discussed in redeveloping Technology Park.

Other Considerations

Economic development strategies need to be holistic and recruit or retain companies that create jobs at all levels, including high value added, mid-management, and low skill-entry level. A community needs to be mindful that it cannot survive alone on recruiting high paying jobs. In order to be successful and build job opportunities, it needs jobs at every skill/occupational level. This is especially true given the job losses that occurred during this last recession.

Lastly, the city needs to take advantage of the branding and name recognition of both Atlanta and North Fulton submarkets in all its marketing materials.

SWOT ANALYSIS

STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS (SWOT)

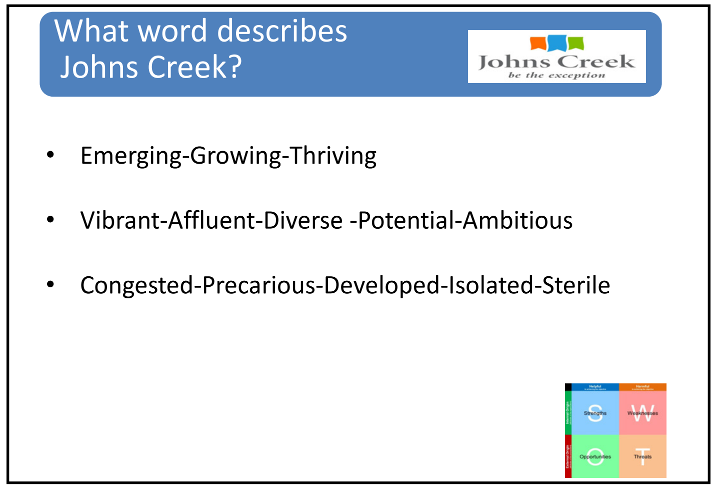
As part of its assessment, SPG interviewed twenty-two (22) key business and community leaders identified by the city and JCA staff. The purpose of the interviews was to gain a sense of community self-perception, along with the critical community "buy-in" to the project and its resulting economic development initiatives. Second, it provided qualitative and quantitative information to be used to sculpt the SWOT (Strengths-Weaknesses-Opportunities-Threats) Analysis and ultimately the Implementation Plan.

Unlike traditional SWOT assessments that focus on issues so general they could apply to almost any community, the consultant paid special attention to those critical issues that will clearly differentiate the city of Johns Creek from other communities. SPG's SWOT process is unique because it ensures that the city considers not only internal issues, but also issues that impact national and international competitiveness. Interviews were conducted during the first week of July 2015, in addition to 32 surveys which were received from the community. Interviews were conducted with leaders from the City Council, Johns Creek Advantage Economic Development Board, commercial real estate brokers, Johns Creek Chamber, CVB, and other key stakeholders.

Figure 41: SWOT Graphic.

The following is a summary of the responses to SPG's questions about what word describes Johns Creek:

Figure 42: Description of Johns Creek.

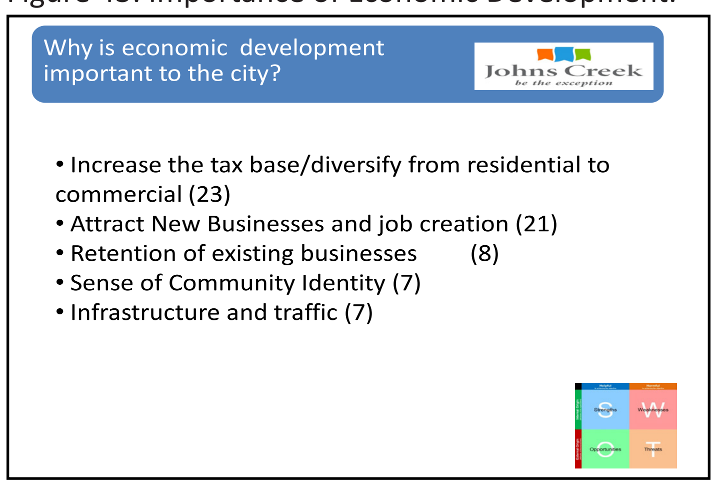


Source: Strategic Planning Group, Inc, 2015.

[2](The number in parentheses following each response indicates the number of times this response was given by individuals).

The top two reasons given for why economic development is important was its role in increasing the tax base away from residential to commercial and attracting new businesses which equates to job creation.

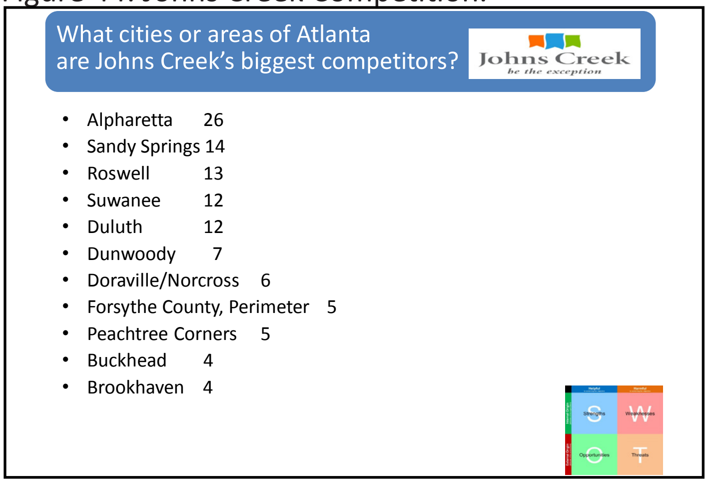
Figure 43: Importance of Economic Development.



Source: Strategic Planning Group, Inc, 2015.

The majority of respondents indicated that Johns Creek is most similar to Alpharetta, followed by Sandy Springs, Roswell, Suwannee and Duluth.

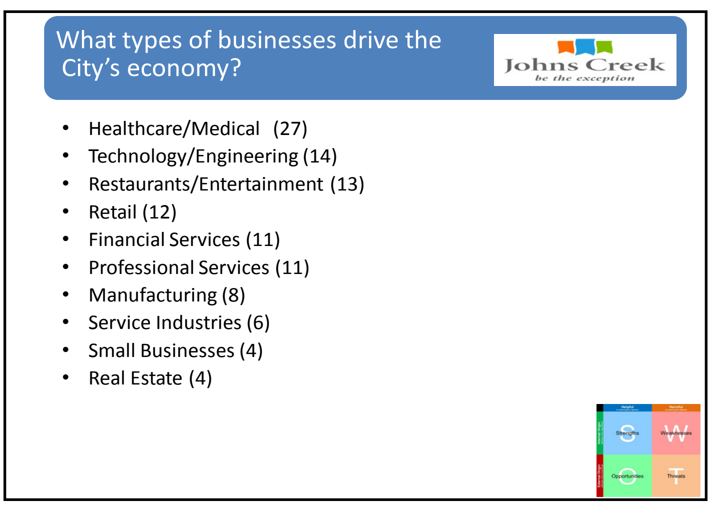
Figure 44: Johns Creek Competition.



Source: Strategic Planning Group, Inc, 2015.

The types of businesses that currently drive the local economy the most are: healthcare/ medical followed by technology/engineering, restaurants/entertainment and retail. This is not surprising given the fact that Johns Creek is predominately a residential community.

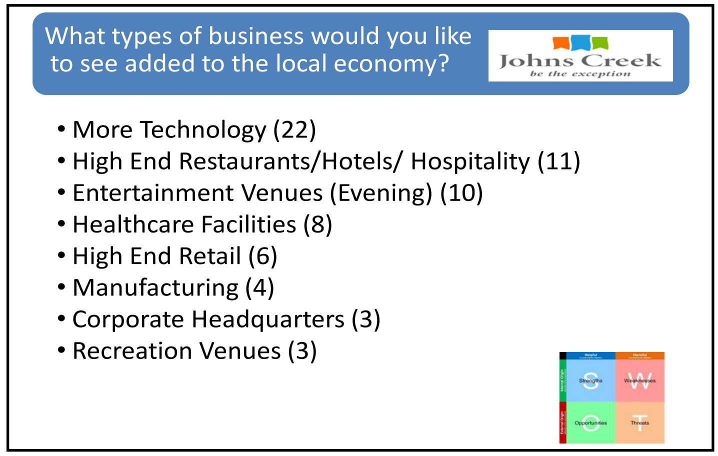
Figure 45: Businesses that Drive Johns Creek Economy.



Source: Strategic Planning Group, Inc, 2015.

When respondents were asked about what types of businesses they would like to see added to the local economy, the highest response by far was more technology followed by the need for more high end restaurants/hotels and entertainment venues, especially in the evening.

Figure 46: Desired Businesses.



Source: Strategic Planning Group, Inc, 2015.

SWOT ANALYSIS REVEALED

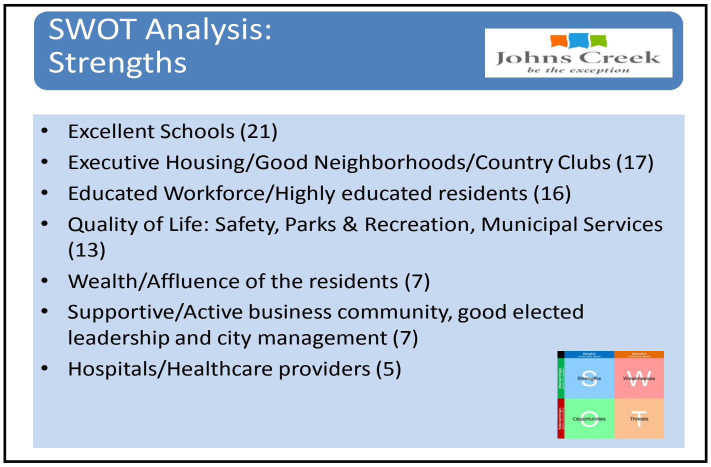
The following describes the main Strengths, Weaknesses, Opportunities and Threats as related to the city's economy. This represents a combination of the responses from the stakeholder interviews and the survey.

(The number in parentheses following each response indicates the number of times this response was given by individuals.)

Strengths

The biggest strengths of the city's economy that were identified by respondents are: excellent schools, executive housing/hood Neighborhoods, educated workforce/highly educated residents, and quality of life factors.

Figure 47: Strengths.

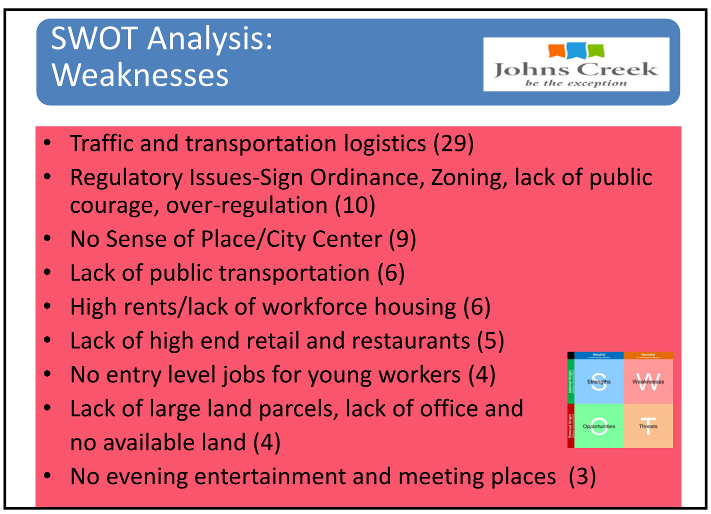


Source: Strategic Planning Group, Inc, 2015.

Weaknesses

By far the biggest city weakness related to economic development was traffic and transportation logistics.

Figure 48: Weaknesses.



Source: Strategic Planning Group, Inc, 2015.

Opportunities

Perceived economic development opportunities were tied to developing a city center, developing entertainment, arts and cultural venues and promoting and growing the medical and healthcare sectors.

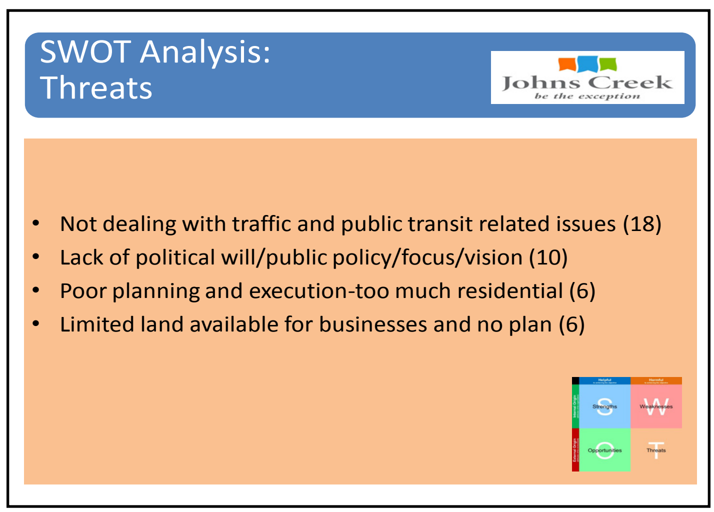
Figure 49: Opportunities.

Source: Strategic Planning Group, Inc, 2015.

Threats

The main threats to the city's economic growth were specifically related to traffic and public transportation. Also noted as a threat was the fear of inactivity and lack of political will/public policy/focus/vision with moving the city forward.

Figure 50: Threats.



Source: Strategic Planning Group, Inc, 2015.

SWOT Summary

The following is a summary of the findings of the SWOT Analysis:

Figure 51: SWOT Summary.

Johns Creek SWOT Analysis

Johns Creek
be the exception

STRENGTHS

- Excellent Schools (21)
- Executive Housing/Good Neighborhoods/Country Clubs (17)
- Educated Workforce/Highly educated residents (16)
- Quality of Life: Safety, Parks & Recreation, Municipal Services (13)
- Wealth/Affluence of the residents (7)
- Supportive/Active business community, good elected leadership and city management (7)
- Hospitals/Healthcare providers (5)

WEAKNESSES

- Traffic and transportation logistics (29)
- Regulatory Issues-Sign Ordinance, Zoning, lack of public courage, over-regulation (10)
- No Sense of Place/City Center (9)
- Lack of public transportation (6)
- High rents/lack of workforce housing (6)
- Lack of high end retail and restaurants (5)
- No entry level jobs for young workers (4)
- Lack of large land parcels, lack of office and no available land (4)
- No evening entertainment and meeting places (3)

OPPORTUNITIES

- Develop a City Center/Central Business District (14)
- Develop entertainment, arts and cultural venues (7)
- Promote and grow Medical/Healthcare Sector (6)
- Explore redevelopment options-Technology Park (3)
- Promote Johns Creek's business friendly aspects (3)

THREATS

- Not dealing with traffic and public transit related issues (18)
- Lack of political will/public policy/focus/vision (10)
- Poor planning and execution-too much residential (6)
- Limited land available for businesses and no plan (6)

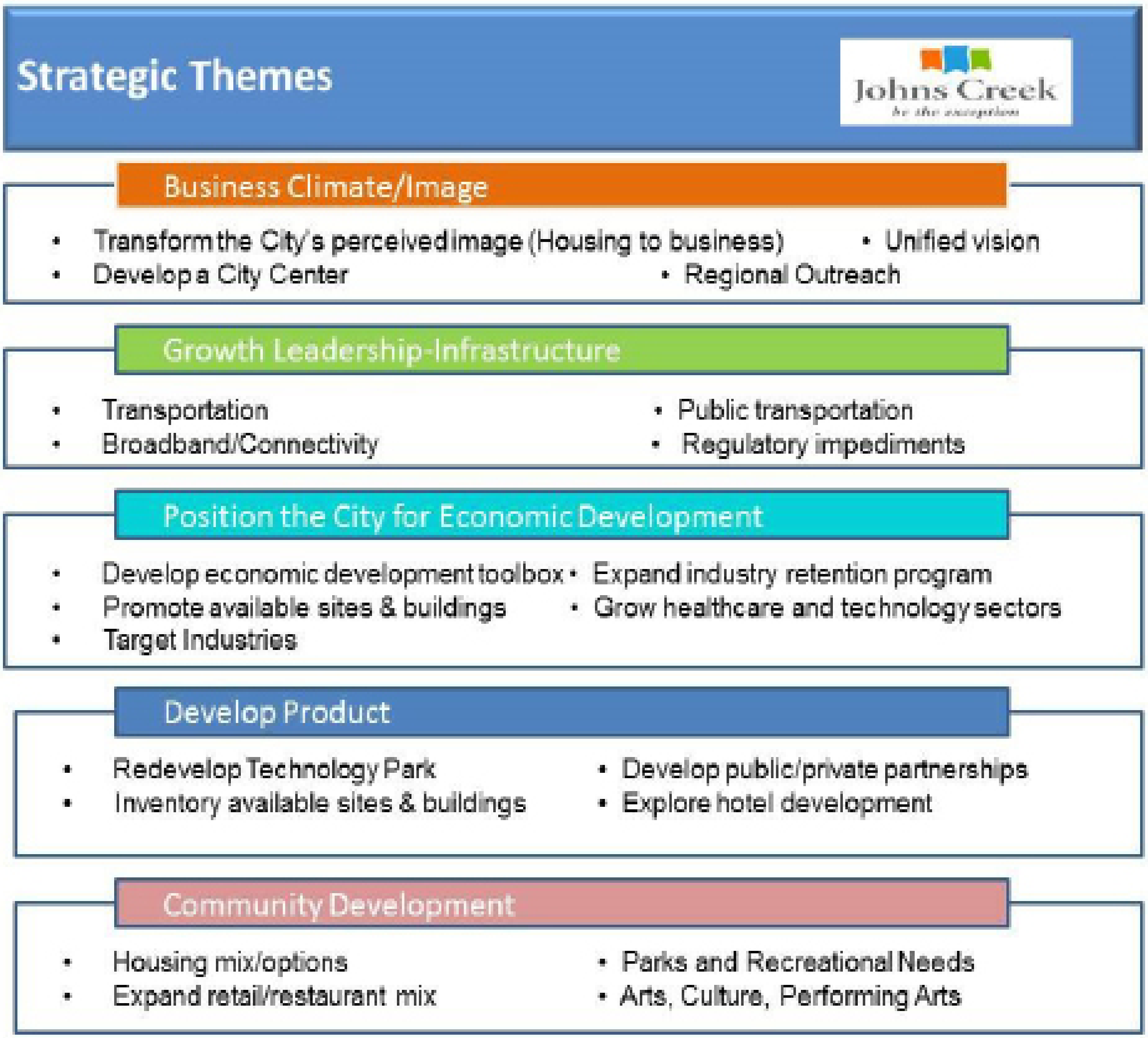
Source: Strategic Planning Group, Inc, 2015.

(The number in parentheses following each response indicates the number of times this response was given by individuals.)

SWOT THEMES

Using the findings of the SWOT and key stakeholder interviews, SPG developed the overall economic development themes that will drive the strategic planning process.

Figure 52: Strategic Themes.



Source: Strategic Planning Group, Inc, 2015.

STRATEGIC PLAN "HOW DO WE GET THERE?"

The recommended strategic economic development plan for the City of Johns Creek is composed of the following elements:

- Goals, objectives and strategies
- Organizational responsibilities for each strategy
- Order and magnitude of financial requirements

GOALS, OBJECTIVES AND STRATEGIES

In the recommended strategic plan, statements are set forth to identify the desired ends of the plan (goals), provide specific and measurable milestones toward which the goals are directed (objectives), and stipulate how activities and programs shall be conducted to achieve the goals and objectives (strategies). Related objectives are listed under each of the goal statements. Explicit strategies are provided for each of the objectives.

Goals and objectives need to be clearly defined and based on realistic expectations in order to formulate specific programs for action. The goals constitute an overall working framework for identifying and assessing alternative strategies, which are assigned priority. The economic development strategies represent action-oriented approaches to the achievement of the stated goals and objectives.

A strategy or strategic action consists of a project or course of action to be undertaken to accomplish a defined objective. Generally, it is possible to express a strategic action in a single sentence or phrase reflecting an approach that could encompass any number of specific activities or tasks. For example, one strategy for attracting high technology firms could be the establishment of a direct mail program based on the purchase of address lists for firms that might be identified in a target industry study. This strategic action would involve such tasks as procuring a mailing list, formulating a series of letters, packaging and mailing the marketing materials, and conducting follow-up contacts.

The strategic plan is the means by which the goals recommended herein are developed as the process continues that can be accomplished, despite the likelihood of change over a period of time. The strategies should be clearly stated, but the individual tasks within each strategy need not be outlined. Some accommodation for flexibility in implementation is desirable. If goals, objectives, and strategies are structured properly, the plan will be flexible enough to respond to unexpected changes with a minimum degree of disruption or disturbance to area economic development efforts as a whole. The SEDP is a living document and as such should be reviewed at least annually in order to determine the status of the objectives and strategies and updated as appropriate.

ORGANIZATIONAL RESPONSIBILITIES

Economic development is more than activities related to businesses retention, expansion and targeting. Today, it is holistic and addresses a community's infrastructure, workforce, housing mix, schooling, community planning and land development regulations and quality of life- all of which affect business location. Once the SEDP has been approved, an implementation matrix defining organizational responsibilities for each of the strategies in the recommended strategic plan should to be specified, with the desired results and a suggested schedule for when the actions are to be undertaken and completed. An implementation matrix is provided in the recommended strategic plan indicating the proposed lead and support roles for the strategies. It will be up to the individual agencies and organizations to reach agreements on assuming the proposed responsibilities.

Organizations currently assuming responsibility for economic development activities in Johns Creek must promote a commitment to the strategic economic development process. The organizations must accept responsibility for the actions and be committed to achieving the desired results. Potential conflicts must be resolved and a consensus among the organizations involved in economic development must be achieved for successful plan implementation.

It is necessary to translate responsibilities for the strategic actions which have been accepted by participants into a work plan. While the recommended strategic plan focuses on overall goals and strategies for developing the economy of Johns Creek, the city's plans must focus on the specific tasks to be accomplished. An annual work program is the means by which the strategic plan implementation results are achieved and evaluated.

The work programs for the participants in this process should define the actions to be taken to achieve the responsibilities agreed to, but until these specific actions are undertaken, little or nothing will be accomplished. It is therefore essential that agreements to assume responsibilities for the various strategies presented in the plan be made explicit. This helps to avoid misunderstandings and provides an incentive for performance.

It is recommended that each organization with economic development responsibilities define their involvement in the form of a detailed work plan on an annual basis, and stipulate tasks to be accomplished consistent with the strategic plan. These should include the specific tasks, time frames, staff requirements, resource requirements, estimated budget, and sources of funding.

IMPLEMENTING THE STRATEGIC PLAN

While several characteristics distinguish strategic planning from other types of planning and goal-setting efforts, it is the implementation that really sets it apart. The key to strategic planning is that it is action-oriented; its focus is on the allocation of scarce resources to critical issues. The implementation phase is crucial. The success of the strategic planning process comes as much from the process itself as from the strategies defined in the plan. The key to implementation is organization.

The various individuals, agencies, and organizations that have helped identify concerns to be addressed for the recommended strategic plan should now continue to be involved in "getting the job done". Responsibilities for the specific projects and actions defined in the plan must be clearly understood and accepted.

Each participant should:

- Commit to agreed responsibilities for action
- Understand the desired results
- Accept responsibility for the actions and their results
- Establish an acceptable time frame within which the actions are to be taken and completed
- Be committed to achieving the desired results.

The importance of creating an effective organizational structure within the community to implement the strategic plan cannot be overemphasized. Turf protection, organizational jealousies, and duplication of effort must be avoided. The process of consensus-building and negotiation which brings about agreement on the strategic plan components should resolve such problems. If not, they must be resolved as organizational responsibilities are assigned and agreed to.

As discussed previously, there must be a link between strategy and budget. Although some strategies will be oriented to policy changes and removal of administrative barriers and not involve monetary resources, successful strategic planning will require allocation of scarce financial resources to implement project-oriented strategies.

CONCLUSION

A list of characteristics found in effective strategic plans is presented below as an appropriate summary for the strategic planning model. Ensuring that programs and projects are credible and relate to the community's economic development goals and objectives is a basic requirement of an effective plan. A clear connection between the plan and the proposed projects or programs is essential for favorable public response and continued financial support by all stakeholders.

The characteristics are:

1. The strategic plan has an analytical basis based on accurate and current information.
2. Available previous studies have been consulted and reflected in the strategic plan.
3. The strategic plan reflects a stakeholder interview and SWOT survey process.
4. Projects and activities in the strategic plan are compatible with the findings.
5. The strategic plan specifies concrete actions that will be undertaken in a defined period of time (approximately one to five years, as warranted).
6. There is appropriate linkage between capital projects and program activities necessary to make the capital projects effective.
7. Roles and responsibilities are clearly defined and assigned within the strategic plan for each proposed action.
8. Organizations or persons assigned roles and responsibilities formally make a commitment to attempt to achieve the related proposed actions.
9. The strategic plan reflects or creates an institutional framework necessary to achieve its objectives or to complete its proposed projects and activities.
10. Proposed actions are realistically achievable within a reasonable time frame.
11. The strategic plan has a formal commitment to an ongoing evaluation and monitoring process, including a formal progress review.

STRATEGIC ACTION PLAN

Many elements of the strategic plan recommended in this chapter address issues discussed in the preceding chapters. The framework is designed for actual decision making guidance by providing the recommended goals, objectives and strategies. These are the items to be acted upon which will direct the participants in the economic development process.

The programs and actions proposed in this recommended strategic plan are intended to provide the foundation for maintaining a collaborative working relationship among the public and private sector entities involved in promoting economic development in the City of Johns Creek, to set forth achievable implementation strategies to guide decision making based on the concerns expressed during the interview and survey processes conducted for this study, and to provide a successful model for city-wide application.

The city's economic development efforts must focus attention on programs to support both new business recruitment and retention of existing businesses and existing job skills. Further economic diversification is also needed, through continued development of the city's, North Fulton and Atlanta Regional Target Industries.

Initiatives have been identified throughout the SEDP to address most of the city's major liabilities or its opportunities for future growth. However, funding these proposals will not be easy. City and other public and private resources (county, state, regional and national) will be required to fully implement the SEDP.

On these key points this SEDP has achieved a resounding consensus. The time now has come to move forward with implementation. The greatest strategic challenge facing Johns Creek is no longer a matter of establishing the correct goals and objectives. Rather, the attention of civic and private sector leaders must now focus on ensuring that the community has viable mechanisms to harness the public and private resources at hand, to develop additional resources, and to deploy them in a way that will make a tangible difference in the future performance of the Johns Creek community economy.

ACTION PLAN FOR CHANGE

Economic development is no longer seen as merely a real estate marketing effort to entice businesses (usually headquarter offices or manufacturing plants) to relocate into the area. Today, economic development is truly about enhancing quality of life. It's about increasing per capita wages, training its workforce, enhancing infrastructure that in turn will protect and enhance the area's natural resources. Economic development encompasses not only image and positioning but also business expansion and retention; while addressing product development, economic redevelopment, infrastructure, and community development. As a result of significant public input, five major themes serve as the "Goals" for the *SEDP.*

Goal 1: PROMOTE CITY IMAGE, CLIMATE AND BRAND FOR ECONOMIC DEVELOPMENT
Goal 2: DEVELOP INFRASTRUCTURE FOR BALANCED GROWTH
Goal 3: POSITION THE CITY FOR ECONOMIC DEVEL OPMENT
Goal 4: DEVELOP PRODUCT - LAND AND BUILDINGS
Goal 5: MAINTAIN QUALITY OF LIFE-COMMUNITY DEVELOPMENT

Each of the goals listed have numerous objectives and strategies, which provide the means of attaining their individual and collective results.

This *SEDP* is very comprehensive. The SEDP contains 5 Goals, 19 objectives and 74 strategies. It should be noted that there is considerable overlap between goals, objectives and strategies and that responsibility for the objectives/strategies involves a host of public and private stakeholders. Without cooperation among all parties, including citizens, the SEDP as outlined below will fail. It is also important to note that this plan does not obligate expenditure of city funds or actions and that any additional funding would require council budget appropriation. See Implementation Matrix for details.

OVERVIEW OF GOALS

Goal 1: PROMOTE CITY IMAGE, CLIMATE AND BRAND FOR ECONOMIC DEVELOPMENT
Improve the city's business image through new economic development initiatives, while building on existing strengths of a proactive city government with a unified vision for balanced growth.

This goal has three (3) objectives and fifteen (15) strategies. The thrust of this goal is to tailor the city's marketed identity to the business comunity from being a high income bedroom community comprised of upper end gated communities, high performing schools and nationally ranked golf courses to a community committed to economic development and expanding the city's tax base, while retaining its upscale residential character.

Objective 1.1: Promote the business identity of the city. Johns Creek will promote the city as a place for business by creating a new brand that emphasizes its strategic regional business location, promote its quality of life, promote the new City Center, with citizen input, and its anchored development projects.

Strategy 1.1.1: Promote the city as a place for business (city is more than residential and education).

Strategy 1.1.2: Work with regional ED partners to establish a regional brand to market.

Strategy 1.1.3: Collaborate with regional partners through a comprehensive MOU to market the North Fulton region for economic development (see appendix for example).

Mixed Use Discussion

Today, much commercial development is environmentally benign, and there are often advantages to locating different uses in close proximity. Mixed use concentrated development, preferably near transit, is seen as a key “smart growth” tool to reduce auto dependence and preserve green space and natural resources. Thus many communities are turning to “mixed use,” which generally refers to a deliberate mix of housing, civic uses, and commercial uses, including retail, restaurants, and offices.

Mixing uses, however, works best when it grows out of a thoughtful plan that emphasizes the connectivity and links among the uses. Results may be haphazard when communities simply enable multiple uses without providing guidance about the mix of uses and how they are spatially related.

To achieve well-planned mixed use development, most of the bylaws describe this as “overlay” districts. This means that the underlying zoning remains in place. Developers may choose to develop according to the underlying zoning or, alternatively, according to the mixed use provisions. The overlay encourages coordinated, cohesive development among lots or through lot consolidation. The overlay approach is especially useful when the community wants to promote a unified approach in an area where there are two or more underlying districts.

Strategy 1.1.4: Develop a marketing plan to promote the city including print, video clips, social media, etc. A good example is Alpharetta’s economic development web page and video.

Objective 1.2: Adopt a unified vision for Technology Park Redevelopment. The city will develop and approve a conceptual plan for the Redevelopment of Technology Park.

Strategy 1.2.1: Determine the best location for key initial redevelopment.

Strategy 1.2.2: Determine the mixed use components for the redevelopment, in conjunction with the Comprehensive Plan Update.

Strategy 1.2.3: Develop a marketing plan to inform the community of the plan.

Strategy 1.2.4: Develop a multi-year funding plan for redevelopment of Technology Park.

Strategy 1.2.5: Develop a pro forma on one or more key redevelopment parcels to ensure its viability. This will require input from property owners.

Strategy 1.2.6: Update the Comprehensive Plan and LDR’s to allow for mixed use development in Technology Park. *This will entail the ability to subdivide and replace existing development pods.*

Objective 1.3: Maintain a proactive city government. Johns Creek will actively promote responsible growth, approve and fund the 5-year Economic Development Plan and subsequent updates. Financial planning will be included in the annual budget submissions and will be included in the Ten Year Financial Forecast.

Strategy 1.3.1: Continue to actively promote responsible growth.

Strategy 1.3.2: Continue to support and fund infrastructure needs for economic growth as part of the annual budget process.

Strategy 1.3.3: Periodically review the Comprehensive Plan and make changes that support economic development growth strategies.

Strategy 1.3.4: Inform development community of regulatory changes that impact business development, i.e. LDRs, building codes, sign ordinances, etc.

Goal 2: DEVELOP INFRASTRUCTURE FOR BALANCED GROWTH

Build on strengths and competitive advantages and provide the necessary infrastructure and services to support and enhance quality of life and economic growth to include roadway improvements at key interchanges, broadband and water and sewer enhancements, while also working with the County to address public transportation improvements.

Transportation and accessibility issues rank as top factors that businesses analyze when relocating. This goal mainly addresses the city's need to provide the necessary infrastructure (water/sewer, transportation, broadband) to sites that have the greatest possibility of being developed or redeveloped within the next five years. To achieve this goal, the SEDP identifies three (3) objectives and eight (8) strategies.

Objective 2.1: Improve Infrastructure to encourage business growth and expansion. Transportation was expressed to be a major concern and the potential need exists for an integrated county wide transportation system.

Strategy 2.1.1: Continue to improve the area's roadway network and work with neighboring communities to resolve bottle necks.

Strategy 2.1.2: Develop a funding plan to improve roadway deficiencies.

Strategy 2.1.3: Collaborate with local and regional stakeholders to educate and advocate for a comprehensive regional transportation plan.

Objective 2.2: Develop broadband if necessary to encourage business growth and expansion to key development sites.

Strategy 2.2.1: Inventory current broadband capacity.

Strategy 2.2.2: Meet with providers to explore methods of expanding and increasing speeds and redundancy if necessary.

Strategy 2.2.3: Ensure that the city especially the Technology Park, has competitive broadband speeds and redundancies.

Objective 2.3: Support and promote a comprehensive water and sewer plan for the city.

Strategy 2.3.1: Coordinate with Fulton County a water and sewer needs assessment when it relates to key development sites.

Strategy 2.3.2: Develop a plan for addressing water and sewer deficiencies that deter business expansion.

Goal 3: POSITION THE CITY FOR ECONOMIC DEVELOPMENT

Develop an economic development program to include promotion of available sites and buildings; creation of innovative partnerships to support existing businesses; creation of a regulatory environment that embraces collaboration; and, address current economic development toolkit and staffing.

Prepare economic development guidelines as it relates to available sites and buildings, incentives, permitting, establishing target industries, and providing adequate staffing to effectively represent the city. This goal has four (4) objectives and twenty four (24) strategies to define the city's commitment to a new approach for developing its tax base.

Objective 3.1: Promote available sites and buildings. The city has a limited number of vacant sites and available buildings. Without having available sites and building it will continue to be a challenge to recruit new industries.

Strategy 3.1.1: Identify key sites and buildings for economic development opportunities.

Strategy 3.1.2: Develop plan to market land/building assets.

Strategy 3.1.3: Collaborate with commercial real estate brokers.

Objective 3.2: Create Innovative partnerships to support existing businesses and expansions. The city cannot work in isolation but needs to continue to establish a strong working relationship with other Economic Development and Business stakeholders.

Strategy 3.2.1: Work with all regional partners to establish a MOU of responsibilities for the city.

Strategy 3.2.2: Work with businesses to create, attract and retain target industries.

Strategy 3.2.3: Develop a comprehensive existing industry program to include survey of existing businesses, visitations, quarterly meetings, etc.

Strategy 3.2.4: The City of Johns Creek will explore options for public/private partnerships.

Strategy 3.2.5: Increase the awareness of local, state and regional resources to assist with retention, attraction and growth of value-added businesses.

Strategy 3.2.6: Schedule regular meetings with commercial real estate brokers and conduct FAM tours.

Strategy 3.2.7: Work with regional and state partners to promote workforce readiness, education and training.

Strategy 3.2.8: Create partnerships with healthcare providers to assist with identifying growth needs.

Strategy 3.2.9: Conduct a pro forma and concept design for one or more parcels in TP to demonstrate viability of redevelopment.

Objective 3.3: Create a regulatory environment that embraces collaboration and cooperation. The city needs to be flexible and customer service oriented in its regulatory environment.

Strategy 3.3.1: Identify and revise regulations that inhibit business growth.

Strategy 3.3.2: Explore business friendly land development policies that encourage business attraction and retention.

Strategy 3.3.3: Formalize and promote the city's streamlined development process.

Strategy 3.3.4: Explore land development policies that will incentivize the development of more inventory on existing parcels (e.g. Technology Park) including mixed use concepts as part of the Comprehensive Plan.

Objective 3.4: Evaluate current City Economic Development Toolkit. The city needs to develop and promote its economic development resources.

Strategy 3.4.1: Consider creating a Johns Creek Development Authority.

Strategy 3.4.2: Consider creating a Community Improvement District (CID) (see appendix for more information).

Strategy 3.4.3: Consider developing and adopting guidelines for awarding incentives with input from stakeholders in Johns Creek.

Strategy 3.4.4: Consider developing incentives for existing and new businesses (see appendix for more information).

Strategy 3.4.5: Conduct economic and fiscal impact analysis on land use and zoning changes.

Strategy 3.4.6: Consider developing comprehensive economic development incentive policies with stakeholders in Johns Creek.

Strategy 3.4.7: Develop a comprehensive funding program for economic development policies and initiatives.

Strategy 3.4.8: Conduct a fiscal and economic impact analysis on projects receiving incentives.

Goal 4: DEVELOP PRODUCT - LAND AND BUILDINGS

Collaborate with public and private sectors to increase the availability of developed sites for value added businesses.

One of the city's greatest weaknesses is the lack of existing/appropriate inventory to house future recruitment of targeted industries. This includes lack of Class "A" Office space inventory, and lack of shovel ready sites outside of Technology Park. This goal and its four (4) objectives and fifteen (15) strategies address the need to maintain occupancies at existing office buildings and create additional inventory where possible to attract middle level employers to the city.

Objective 4.1: Increase available shovel-ready sites for office uses, advanced manufacturing, research & development, and distribution. The city has limited vacant land for development and needs to look to redevelopment as well.

Strategy 4.1.1: Work with landowners to develop site for office, advanced manufacturing, research, and development.

Strategy 4.1.2: Work with developers to redevelop Technology Park.

Strategy 4.1.3: Coordinate with Technology Park to revise the master plan .

Strategy 4.1.4: Explore creation of a Community Improvement District (CID) for Technology Park.

Strategy 4.1.5: Establish design and density options for Technology Park.

Strategy 4.1.6: Consider utilizing the Johns Creek Development Authority to create a land bank.

Shovel-ready means having a developable site in a good location that is available, served by utilities, properly zoned, and prepared for use through appropriate planning and permitting.

Another definition for shovel-ready is: land that can be ready for construction to begin within six months with minimal basic infrastructure needed before construction starts.

Objective 4.2: Identify key parcels that can be easily converted to shovel ready sites.

Strategy 4.2.1: Compile inventory of land and ownership of properties zoned and ready for detailed master site planning.

Strategy 4.2.2: Meet with landowners/developers of parcels greater than 2 acres to determine action needed to develop shovel ready sites.

Strategy 4.2.3: Develop land development regulations that encourage optimized usage on remaining vacant land.

Objective 4.3: Encourage development of more Class "A" office and R&D space. Continue to work with private developers in the permitting and construction of Class A office space.

Strategy 4.3.1: Create policies that will expedite infrastructure for Class "A" office and R & D investment.

Strategy 4.3.2: Lead in the creation of public/private partnerships to prepare the city to attract business investment.

Strategy 4.3.3: Develop ways the city can partner with developers to creatively structure financing for infrastructure needs and reduce impacts of regulatory demands.

Strategy 4.3.4: Develop a hospital overlay district to protect and allow for future expansion.

Objective 4.4: Conduct a Hotel Feasibility Study. This should be done following completion of the Recreation and Parks Plan and/or after an anchor for the redevelopment of Technology Park is determined.

Strategy 4.4.1: Determine funding partners for a feasibility study.

Strategy 4.4.2: Determine under met hotel and meeting space needs.

Strategy 4.4.3: Partner with CVB to identify potential sites for hotel/conference meeting space.

The purpose of the medical overlay within Technology Park is to support the investment efforts of the various institutional uses located within the district by providing restrictions on those uses deemed incompatible with the future land uses anticipated in the area. The area is also intended to have a more pedestrian-friendly, walkable character in the future, and therefore replacement standards that support this vision are included in the overlay district. Finally, mapped limitations on height will help reduce the impact of large scale uses on the surrounding neighborhoods.

Example: Marietta, Georgia. The Kennestone Hospital Overlay District is established to support an appropriate transition of medical-related uses to existing established residential neighborhoods, enhance the quality and compatibility of development, guidelines, to encourage the most appropriate use of land, and to promote safe and efficient movement of traffic in and around the area surrounding Kennestone Hospital.

Goal 5: MAINTAIN QUALITY OF LIFE-COMMUNITY DEVELOPMENT

Market the City Center to give it a sense of "place" and diversify the retail, office and housing opportunities. Also, promote the strong assets of the City to include schools, municipal services, parks and recreation.

During the public interview process of the development of this SEDP, the interviewees voiced concerns about not having any cultural venues or facilities for large gatherings. This SEDP acknowledges the community's desire for a sense of "place," which included cultural and entertainment amenities. This goal's five (5) objectives and twelve (12) strategies define the SEDP's commitment to utilize resources of the city in its approach to expanding and diversifying the city's economic base. Stakeholder input shall be required to determine needs.

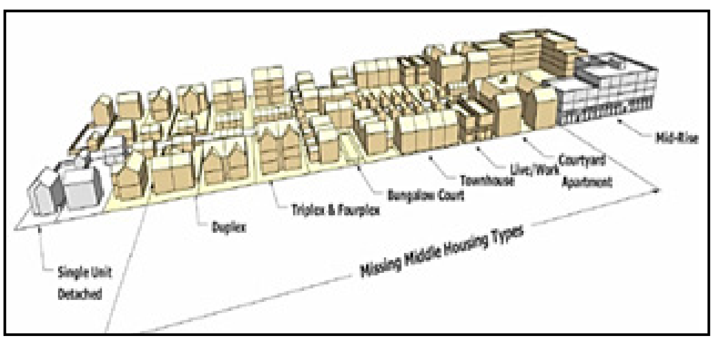
Objective 5.1: Develop a list of unmet amenities for the city to pursue.

Strategy 5.1.1: Examine gaps in services (i.e. theatres, bowling alleys, skating rinks, and other evening activity generating uses).

Strategy 5.1.2: Explore opportunities for additional art and cultural venues and events.

Strategy 5.1.3: Promote a City Center as a regional business venue and cultural asset.

Examples of range of housing product.



Objective 5.2 Maintain a range of housing product.

Strategy 5.2.1: Promote a full range of housing products in conjunction with the Comprehensive Plan review.

Objective 5.3: Use parks and recreation facilities as economic development drivers.

Strategy 5.3.1: Complete the Recreation and Parks Master Plan.

Strategy 5.3.2: Implement the Recreation and Parks Master Plan.

Strategy 5.3.3: Consider promoting Sports Tournaments

Objective 5.4: Enhance arts, culture and performing arts.

Strategy 5.4.1: Conduct a Performing Arts Civic Center Mixed Use Feasibility Study.

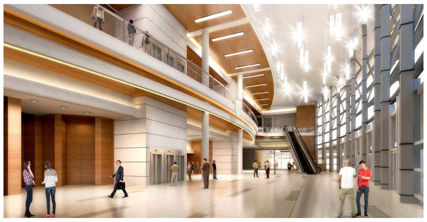
Strategy 5.4.2: If feasibility study indicates, consider using performing arts, cultural venues and events as economic development drivers.

Objective 5.5: Expand retail, restaurant and entertainment offerings.

Strategy 5.5.1: Promote the development of destination entertainment and destination retail.

Strategy 5.5.2: Explore redevelopment of under-performing shopping centers (40% or higher vacancy).

Example: Pembroke Pines Mixed Use Performing Arts Center



The new City of Pembroke Pines City Hall and Civic Center Complex will break ground on March, 2015. It will be the highlight component of the Pembroke Pines Town Center. The design includes a 166,895 square foot civic center with a 3,500 seat acoustically designed performing arts/banquet/exhibition grand hall, a full service kitchen, performing dressing and green rooms, an exquisitely designed grand lobby, and the administrative offices for the city. The stand-alone 6,000 square foot Commission Chambers building will serve as the legislative venue for the elected officials. A 10,000 square foot art gallery will define the north end of the complex. These three building surround a multi-media ready community plaza where the elected officials and the community can celebrate designated and important times of the year.

RECOMMENDATIONS FOR ED STRUCTURING

The current structure of Johns Creek Advantage (JCA) has been in place for the past 1½ years. The city provides $100,000 in funding which represents one third of the JCA total funding. The remaining two thirds of funding are provided by the private sector through pledges over a 5 year period. This represents a strong commitment from the business community to support economic development.

There are distinct advantages to having economic development remain outside of City Hall. First, the private sector funding would be lost, putting the city in the position of having to fund the economic development effort 100%. Second, confidentiality of the clients would be compromised. The city must comply with public record requests and would have to divulge the names of the companies expressing an interest in coming to Johns Creek. Once word is out publicly, then companies are at a distinct disadvantage with their competitors and they might even start to lose employees.

Recommendation: It is our recommendation that the current structure be kept in place for at least 5 years and then be examined for possible changes. Further, a formal MOU should be entered into between the city and JCA.

The following are excerpts on public private economic development organizations taken from *Managing Economic Development Organizations Manual, International Economic Development Council, November 2011).*

ROLES OF PUBLIC-PRIVATE ORGANIZATIONS

There are two roles that the public-private economic development organization (EDO) may play. Normally, the organization is developed as an implementer of economic development projects. However, the organization can also be utilized as a planning, technical advisory, policy development, or information dispersal organization, which in turn leads to the implementation role.

Policy Planning Organizations. In the role of a policy-planning tool, the organization may help set local development objectives and policies. The organization may facilitate communication between public and private leaders, serve as a source of private sector advice on technical aspects of development, and recommend specific actions to cope with economic problems, or set general development priorities.

The specific functions and roles in policy development and planning may include:

- The development of consensus on problems and solutions.
- Providing advice to elected officials on policy matters or to other local organizations and insti-

tutions on economic development.
- Providing recommendations on the implementation of economic development activities.

If staffing assistance is available, the organization may assume a much more technical role that may include:

- Reviewing and evaluating local, state, and federal legislation from the local economic perspective.
- Examining other states' innovative development ideas and recommending local actions.
- Planning, research, and analysis.
- Analyzing fiscal impacts and providing market studies and cost-benefit reviews.
- Maintaining and updating a database to evaluate changes in local, county, state, regional, and/or national conditions (e.g., available land & buildings by type, classification, zoning, lease terms, etc.).
- Analyzing and reviewing incentive mechanisms to maximize capital leverage (e.g., tax abatements, grants, loans, etc.).
- Developing strategies to achieve development objectives (e.g., determine a describable business mix, new locations and relocations).
- Analyzing potential business development problems and opportunities.
- Identifying and adopting economic growth indicators.
- Developing capacity to present policy-oriented impact analysis.

Public-private EDOs can offer valuable assistance in establishing public development policy and are a way to directly involve private sector leaders in the process.

Implementation Organizations. Public-private organizations are usually quasi-public corporations because they are legally, and physically, outside of the local government, yet they involve public funding and they may take on some roles traditionally reserved by the public sector. They can be independent private sector corporations that serve a public purpose and have both public and private sector representatives on their boards of directors, or they can be institutions that are enabled by city, state, or federal legislation to use public powers or special financing tools. The public-private mix within these institutions may occur in board representation, funding, objectives, and/or staff. Their financing and implementation functions ad roles can include: financier, developer, and information service provider.

PUBLIC/PRIVATE EDO STRUCTURE AND GOVERNANCE

In most instances, the public-private partnership operates like a for-profit organization but with elected officials appointing the board so the public sector has a say in the organization's operations. It may also include elected officials in the board composition. Often public money is used to finance the organization initially while private funds are raised, and upon establishing private funding the budget reflects the dual funding sources. Some organizations reach a point when funding is self-perpetuating without continuing public funding, but this is rarely the case.

Most public-private EDOs are governed by a mixed (public/private) board of directors which hire the executive director. Most public-private organization boards are composed of business, labor, and civic group representatives, as well as ex officio members from local government. These boards provide a useful institutional setting for improving coordination between public and private sectors while providing additional capital commitments from the local business community in addition to public funds, resulting in more capital leverage. The board members are usually selected because of their ability to influence the allocation of resources or their specific expertise.

There are several advantages to public-private EDOs having board members from the public and private sectors. Through the board of directors, the EDO staff has direct access to both public and private talent and resources. Public officials can assist with development problems that may arise in the local government review and approval process and assist the EDO staff in meeting specific client needs.

Public-private organizations generally have the legal powers normally associated with private enterprises and governments, such as the power to enter into contracts. However, they are dependent on local government for assistance in matters such as the power to condemn land, or to receive funding from Special Improvement Districts, PILOTS or TIF funded projects. Also, local governments are the source of issuance of certain types of bonds to fund projects or assist business development.

Most public-private partnerships are established as private, non-profit corporations. This may allow them to transact activities either prohibited to local government under most state constitutions or which the locality will not normally allow due to public policy or local regulations. Many activities are built around the ability to use funding from both the public and private sectors.

Public-private organizations may use capital revolving funds managed under contract by local governments and may disburse funds as grants, in addition to loans and investments.

ADVANTAGES & LIMITATIONS OF PUBLIC-PRIVATE EDOS

Public-private organizations minimize many of the problems, and retain many of the advantages, of organizations in both sectors. In partnering with the private sector, an EDO gains several administrative advantages, which are listed below:

- The goals and direction of the EDO reflects a consensus of the local government and the business community, thus ensuring broader support for programs and initiatives.
- Private/public partnerships have only a few political constraints (e.g., sunshine laws and staff recruitment). Moreover, an unpaid board directing a public-private EDO has little to lose from making bold decisions because they earn their living elsewhere.
- EDOs can use public resources and powers without necessarily the same limitations or processes required of public agencies (e.g., a public process, citizen review, and civil service restrictions).
- Public/private EDOs are free to expand their activities beyond that of the local government since they are not restrained by a city charter, partially because they can use the functions and powers of legal, private subsidiaries and affiliates.
- Public-private agencies can take on the "straw man" role, proposing the project, sampling public reaction, and allowing the local government to either support or oppose it.
- Additionally, a public-private EDO may be able to draw on a broader range of expertise than either the public or private sectors would normally afford or traditionally use. Working together builds upon and creates new skills and understanding.

There are a variety of financial advantages to organizing as a public-private partnership:

- Public-private EDOs can mobilize both public and private resources and are financially flexible.
- Public-private organizations can invest in a private business venture using their own funds, whereas public organizations will normally have to demonstrate a clear public purpose.
- The local government debt ceiling may not be affected the EDOs’ borrowing since they are independent from the city. (However, most project funding may require local government financing for major projects, such as infrastructure.)
- Public-private EDOs are able to accept donations due to their tax exempt status, thereby offering advantages to contributors benefiting from tax deduction advantage.
- Lastly, a public-private EDO may eventually be financially self-supporting through management and service fees, and/or membership dues, thus eliminating the need for continued local government contributions.

LIMITATIONS

One of the strengths but also one of the largest limitations that a public-private EDO faces is the public-private EDOs are not under the same degree of public control as public agencies, which broadens the abilities of the organization, but can lead to questions concerning the appropriateness and accountability of its actions. The organization must remain conscious of this pitfall to maintain public support, and thus support of both the public and private communities.

CONCLUSION

There is no such thing a “typical” EDO because its governance structure will depend on a variety of economic, social, and political factors-and no two communities are the same. Once a governance structure is in place, the EDO should start developing its core competencies. It is important that every staff member understand who the customer is and deliver excellence in service thereinafter.

Johns Creek Strategic Economic Development Plan: 2016-2021 Implementation Matrix						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	2016-2017	2017-2018	2019-2021	
GOAL 1: PROMOTE CITY IMAGE, BUSINESS CLIMATE AND BRAND FOR ECONOMIC DEVELOPMENT						
OBJECTIVE 1.1: Promote the business identity of the City						
Strategy 1.1.1: Promote the City as a place for business (City is more than residential and education)	City, JCA, Chamber					City Resources
Strategy 1.1.2: Work with regional ED partners to establish a regional brand to market	JCA, City, Chamber					JCA, City
Strategy 1.1.3: Collaborate with regional partners through a comprehensive MOU to market the North Fulton region for economic development	JCA, City					Staff Time
Strategy 1.1.4: Develop a marketing plan to promote the City including print, video clips, social media, etc.	City, JCA, Chamber, CVB					Staff Time
OBJECTIVE 1.2: Adopt a unified vision for Technology Park Redevelopment	City, City Council					
Strategy 1.2.1: Determine the best location for key initial redevelopment	City, City Council					City
Strategy 1.2.2: Determine the mixed use components for the redevelopment, in conjunction with the comprehensive plan update.	City, City Council					City
Strategy 1.2.3: Develop a marketing plan to inform the community of the plan	City, City Council, JCA, Chamber					City (new resources)
Strategy 1.2.4: Develop a multi-year funding plan for the redevelopment of the Park	City, City Council					City
Strategy 1.2.5: Develop a pro forma on one or more key redevelopment parcels to ensure its viability. This will require input from property owners	City					City
Strategy 1.2.6: Update the Comprehensive Plan and LDR's to allow for mixed use development in Technology Park	City, City Council					City
OBJECTIVE 1.3: Maintain proactive City government						
Strategy 1.3.1: Continue to actively promote responsible growth	City, City Council					City
Strategy 1.3.2: Continue to support and fund infrastructure needs for economic growth as part of the annual budget process	City, City Council					City
Strategy 1.3.3: Periodically review the Comprehensive Plan and make changes that support economic development growth strategies	City, City Council					City
Strategy 1.3.4: Inform development community of regulatory changes that impact business development, i.e. LDRs, Building Codes, Sign Ordinances etc.	City, JCA					City, JCA, Chamber

Yellow means implementation phase
Green means on going
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Johns Creek Strategic Economic Development Plan: 2016-2021 Implementation Matrix						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	2016-2017	2017-2018	2019-2021	
GOAL 2: DEVELOP INFRASTRUCTURE FOR BALANCED GROWTH						
OBJECTIVE 2.1: Improve infrastructure to encourage business growth and expansion						
Strategy 2.1.1: Continue to improve the area's roadway network and work with neighboring communities to resolve bottle necks	City, MPO					City, State, Federal
Strategy 2.1.2: Develop a funding plan to improve roadway deficiencies	City, MPO					City, State, Federal
Strategy 2.1.3: Collaborate with local and regional stakeholders to educate and advocate for a comprehensive regional transportation plan	City, MPO					City, State, Federal
OBJECTIVE 2.2: Develop broadband to encourage business growth and expansion to key development sites						
Strategy 2.2.1: Inventory current broadband capacity	JCA, City, Broadband Providers					JCA, City
Strategy 2.2.2: Meet with providers to explore methods of expanding and increasing speeds and redundancy	JCA, City, Broadband Providers					JCA
Strategy 2.2.3: Ensure that the City especially the Technology Park, has competitive broadband speeds and redundancies	JCA, City, Broadband Providers					JCA
OBJECTIVE 2.3: Develop water and sewer infrastructure to encourage business growth and expansion of key dev. sites						
Strategy 2.3.1: Coordinate with Fulton County a water and sewer needs assessment when it relates to key development sites	City, Fulton County					City
Strategy 2.3.2: Develop a plan for addressing water and sewer deficiencies that deter business expansion	City, Fulton County					City, County

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Johns Creek Strategic Economic Development Plan: 2016-2021 Implementation Matrix						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	2016-2017	2017-2018	2019-2021	
GOAL 3: POSITION THE CITY FOR ECONOMIC DEVEOPMENT						
OBJECTIVE 3.1: Promote available sites and buildings						
Strategy 3.1.1: Identify key sites and buildings for economic development opportunities	JCA, City, Chamber					JCA, City
Strategy 3.1.2: Develop plan to market land/building assets	JCA, City					JCA, City (new)
Strategy 3.1.3: Collaborate with commercial real estate brokers and Johns Creek Advantage to establish a building and sites data base	JCA, City					JCA , City, Brokers
OBJECTIVE 3.2: Create innovative partnerships to support existing businesses and new businesses						
Strategy 3.2.1: Work with all regional partners to establish a MOU of responsibilities for the City and regional partners	City, JCA					**staff time**
Strategy 3.2.2: Work with businesses to create, attract and retain target industries	JCA, City, Chamber					JCA, staff time, Chamber
Strategy 3.2.3: Develop a comprehensive existing industry program to include survey of existing businesses, visitations, quarterly meetings, etc.	JCA					JCA
Strategy 3.2.4: The City of Johns Creek will explore options for public/private partnerships	JCA, City, Chamber					JCA, City (new)
Strategy 3.2.5: Increase the awareness of local, State and Regional resources to assist with retention, attraction and growth of value-added businesses	JCA, City					JCA
Strategy 3.2.6: Schedule regular meetings with commercial real estate brokers and conduct FAM tours	JCA, City, Chamber					JCA
Strategy 3.2.7: Work with regional and state partners to promote workforce readiness, education and training	JCA, Chamber, State of Georgia					JCA
Strategy 3.2.8: Create partnerships with healthcare providers to assist with identifying growth needs	JCA, City					JCA, City
Strategy 3.2.9: Conduct a pro forma and concept design for one or more parcels in TP to demonstrate viability of redevelopment	City					City (new)
OBJECTIVE 3.3: Create a regulatory environment that embraces collaboration and cooperation						
Strategy 3.3.1: Identify and revise regulations that inhibit business growth	City, JCA					City, JCA
Strategy 3.3.2: Explore business friendly land development policies that encourage business attraction and retention	City, JCA					City, JCA
Strategy 3.3.3: Formalize and promote the City's streamlined development process	City, JCA					City, JCA
Strategy 3.3.4: Explore land development policies that will incentivize the development of more inventory on existing parcels (e.g. Technology Park) including mixed use concepts as part of the Comprehensive Plan	City, City Council					City
OBJECTIVE 3.4: Evaluate current City economic development toolkit						
Strategy 3.4.1: Consider creating a Johns Creek Development Authority	City, City Council, JCA					City
Strategy 3.4.2: Consider creating a Community Improvement District (CID)	City, City Council, JCA					City
Strategy 3.4.3: Consider developing and adopt guidelines for awarding incentives with input from stakeholders	City, City Council, JCA					City
Strategy 3.4.4: Consider developing incentives for existing and new businesses	City, City Council, JCA					City
Strategy 3.4.5: Conduct economic and fiscal impact analysis on land use and zoning changes	City					City New
Strategy 3.4.6: Consider developing comprehensive economic development incentive policies with input from stakeholders in Johns Creek	City, City Council, JCA					City New
Strategy 3.4.7: Develop a comprehensive funding program for economic development policies and initiatives	City. City Council					City
Strategy 3.4.8: Conduct a fiscal and economic impact analysis on projects receiving incentives	City, City Council, JCA					City new

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Johns Creek Strategic Economic Development Plan: 2016-2021 Implementation Matrix						
ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	2016-2017	2017-2018	2019-2021	
GOAL 4: DEVELOP PRODUCT-LAND and BUILDINGS						
OBJECTIVE 4.1: Increase available Shovel-Ready sites for Office Uses, Advanced Manufacturing, Research & Development						
Strategy 4.1.1: Work with landowners to develop sites for office, advanced manufacturing, research and development	City, JCA					City, JCA, Private Partners
Strategy 4.1.2: Work with developers to redevelop Technology Park	City, JCA					City, JCA
Strategy 4.1.3: Coordinate with Technology Park to revise the master plan	City, JCA					City, JCA
Strategy 4.1.4: Explore creation of a Community Improvement District (CID) for Technology Park	City, City Council, JCA					City
Strategy 4.1.5: Establish design and density options for Technology Park	City, City Council, JCA					City (new), JCA, Private Partners
Strategy 4.1.6: Consider utilizing the Johns Creek Development Authority to create a land bank	City, City Council, Johns Creek Dev. Authority					JCDA
OBJECTIVE 4.2: Identify key parcels that can be readily converted to shovel ready sites						
Strategy 4.2.1: Compile inventory of land and ownership of properties zoned and ready for detailed master site planning	City, JCA					City, JCA
Strategy 4.2.2: Meet with landowners/developers of parcels greater than 2 acres to determine action needed to develop shovel ready sites	City, JCA					City, JCA
Strategy 4.2.3: Develop land development regulations that encourage optimized usage on remaining vacant land	City, City Council					City new,
OBJECTIVE 4.3: Encourage development of Class "A" office and R & D space						
Strategy 4.3.1: Create policies that will expedite infrastructure for Class "A" office and R & D investment	City, City Council, JCA					City new, JCA
Strategy 4.3.2: Lead in the creation of public/private partnerships to prepare the City to attract business investment	City, City Council, JCA					City, JCA, Private Partners
Strategy 4.3.3: Develop ways the City can partner with developers to creatively structure financing for infrastructure needs and reduce impacts of regulatory demands	City, City Council, JCA					City, JCA, Private Partners
Strategy 4.3.4: Develop a Hospital Overlay District to protect and allow for future expansion	City, City Council, Emory Hospital					City
OBJECTIVE 4.4: Conduct a Hotel Feasibility Study						
Strategy 4.4.1: Determine funding partners for a feasibility study	CVB, City, JCA					CVB
Strategy 4.4.2: Determine hotel and meeting space needs	CVB, City, JCA					CVB
Strategy 4.4.3: Partner with CVB to identify potential sites for hotel/conference meeting space	CVB, JCA, City					CVB

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Johns Creek Strategic Economic Development Plan: 2016-2021 Implementation Matrix

ACTIONS	RESPONSIBLE PARTIES	TIMEFRAME				RESOURCES
		Ongoing	2016-2017	2017-2018	2019-2021	
GOAL 5: MAINTAIN QUALITY OF LIFE-COMMUNITY DEVELOPMENT						
OBJECTIVE 5.1: Develop a list of unmet amenities for the City to pursue						
Strategy 5.1.1: Examine gaps in services i.e. theatres, bowling alleys, skating rinks, and other evening activity generating uses	Chamber, CVB, City					Chamber, CVB, City
Strategy 5.1.2 Explore opportunities for arts and crafts, and other cultural events and venues	CVB, Chamber, Arts Alliance, City					CVB, Chamber, Arts Alliance
Strategy 5.1.3: Promote the Central Business District as a regional performing arts venue and cultural asset	Chamber, CVB, Arts Allliance, JCA					CVB, Chamber, Arts Alliance
OBJECTIVE 5.2: Maintain a range of housing product						
Strategy 5.2.1: Promote a full range of housing products in conjunction with the Comprehensive Plan review	City					City new
OBJECTIVE 5.3: Use parks and recreation facilities as economic development drivers						
Strategy 5.3.1: Adopt the Recreation and Parks Master Plan	City					City
Strategy 5.3.2: Implement the Recreation and Parks Master Plan	City, City Council					City new
Strategy 5.3.3: Consider promoting sports tournments	City, CVB					City new, CVB
OBJECTIVE 5.4: Enhance arts, culture and performing arts						
Strategy 5.4.1: Conduct a Performing Arts Civic Center Mixed Use Feasibility Study	City, City Council					City new
Strategy 5.4.2: If feasibility study indicates, consider using performing arts, cultural venues and events as economic development drivers	City, City Council, CVB, Chamber					City, CVB, Chamber
OBJECTIVE 5.5: Expand retail, restaurant, entertainment offerings						
Strategy 5.5.1: Promote the development of destination entertainment and destination retail	JCA, City					JCA
Strategy 5.5.2: Explore redevelopment of under-performing shopping centers (40% or higher vacancy)	City, JCA					City/JCA

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Appendix

APPENDIX A RETAIL GAP ANALYSIS

Household Trend 2015

Retail Gap

Radius 1: , 0.00 - 5.00 Miles, Total

Description	2010 Census	2015 Estimate	%Change 2010-2015	2020 Projection	%Change 2015-2020
Universe Totals					
Population	154,442	173,717	12.48%	190,016	9.38%
Households	51,959	57,873	11.38%	63,010	8.88%
Families	42,100	46,923	11.46%	51,124	8.95%
Housing Units	54,779	60,709	10.83%	65,855	8.48%
Group Quarters Population	61	61	-0.36%	60	-1.71%

Description	2000 Census	%	2015 Estimate	%	2020 Projection	%
Total Households by Income	36,567		57,873		63,010	
Income Less than $15,000	1,225	3.35%	2,761	4.77%	2,904	4.61%
Income $15,000 - $24,999	1,268	3.47%	2,988	5.16%	3,099	4.92%
Income $25,000 - $34,999	1,787	4.89%	2,720	4.70%	2,852	4.53%
Income $35,000 - $49,999	3,345	9.15%	4,436	7.67%	4,625	7.34%
Income $50,000 - $74,999	6,458	17.66%	8,076	13.95%	8,655	13.74%
Income $75,000 - $99,999	6,441	17.61%	7,247	12.52%	7,715	12.24%
Income $100,000 - $124,999	5,293	14.47%	7,115	12.29%	7,419	11.77%
Income $125,000 - $149,999	3,264	8.93%	5,348	9.24%	5,890	9.35%
Income $150,000 - $199,999	3,818	10.44%	7,619	13.17%	8,405	13.34%
Income $200,000 - $249,999	1,765	4.83%	2,880	4.98%	3,678	5.84%
Income $250,000 - $499,999	1,495	4.09%	4,674	8.08%	5,271	8.37%
Income $500,000 or more	409	1.12%	2,009	3.47%	2,496	3.96%
Average Household Income	$111,646		$131,079		$135,732	
Median Household Income	$91,305		$102,489		$105,574	
Median HH Income by Single-Class. Race						
White Alone	93,022		113,381		117,843	
Black or African American Alone	82,464		63,984		65,617	
Amer Indian and Alaska Native Alone	54,730		44,702		51,282	
Asian Alone	91,026		99,039		104,477	
Native Hawaiian and Other Pacific Islan	14,999		52,013		59,357	
Some Other Race Alone	43,179		44,896		45,924	
Two or More Races	68,779		73,278		74,878	
Hispanic or Latino	63,075		55,925		57,663	
Not Hispanic or Latino	92,233		104,979		108,318	

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Household Trend 2015

Retail Gap

Radius 1: , 0.00 - 5.00 Miles, Total

Description	2010 Census	%	2015 Estimate	%	2020 Projection	%
Households by Household Type and Size						
Nonfamily Households	9,859		10,950		11,885	
1-person	8,170	82.87%	9,109	83.19%	9,890	83.21%
2-person	1,437	14.58%	1,558	14.23%	1,681	14.14%
3-person	174	1.76%	202	1.84%	227	1.91%
4-person	48	0.49%	48	0.44%	50	0.42%
5-person	19	0.19%	22	0.20%	25	0.21%
6-person	7	0.07%	8	0.07%	10	0.08%
7-or-more-person	4	0.04%	3	0.03%	3	0.03%
Family Households	42,100		46,923		51,124	
2-person	12,581	29.88%	13,782	29.37%	14,930	29.20%
3-person	10,286	24.43%	11,548	24.61%	12,590	24.63%
4-person	12,570	29.86%	13,434	28.63%	14,399	28.16%
5-person	4,704	11.17%	5,640	12.02%	6,269	12.26%
6-person	1,424	3.38%	1,818	3.87%	2,103	4.11%
7-or-more-person	534	1.27%	701	1.49%	832	1.63%

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Household Trend 2015

Retail Gap

Radius 2: , 0.00 - 10.00 Miles, Total

Description	2010 Census	2015 Estimate	%Change 2010-2015	2020 Projection	%Change 2015-2020
Universe Totals					
Population	584,189	647,322	10.81%	701,836	8.42%
Households	206,499	227,544	10.19%	246,067	8.14%
Families	152,563	168,140	10.21%	181,885	8.17%
Housing Units	221,539	242,715	9.56%	261,318	7.66%
Group Quarters Population	858	835	-2.73%	806	-3.48%

Description	2000 Census	%	2015 Estimate	%	2020 Projection	%
Total Households by Income	156,255		227,544		246,067	
Income Less than $15,000	7,786	4.98%	16,220	7.13%	16,947	6.89%
Income $15,000 - $24,999	9,004	5.76%	18,267	8.03%	18,791	7.64%
Income $25,000 - $34,999	12,905	8.26%	17,913	7.87%	18,836	7.65%
Income $35,000 - $49,999	21,693	13.88%	24,719	10.86%	26,071	10.60%
Income $50,000 - $74,999	33,000	21.12%	37,865	16.64%	40,185	16.33%
Income $75,000 - $99,999	24,669	15.79%	27,530	12.10%	29,706	12.07%
Income $100,000 - $124,999	16,929	10.83%	22,891	10.06%	24,504	9.96%
Income $125,000 - $149,999	9,785	6.26%	16,096	7.07%	17,995	7.31%
Income $150,000 - $199,999	10,254	6.56%	21,362	9.39%	23,542	9.57%
Income $200,000 - $249,999	4,729	3.03%	7,750	3.41%	9,896	4.02%
Income $250,000 - $499,999	4,080	2.61%	11,955	5.25%	13,455	5.47%
Income $500,000 or more	1,421	0.91%	4,976	2.19%	6,139	2.49%
Average Household Income	$90,554		$103,829		$107,548	
Median Household Income	$70,257		$74,199		$76,855	
Median HH Income by Single-Class. Race						
White Alone	75,288		90,435		94,341	
Black or African American Alone	52,420		49,421		51,879	
Amer Indian and Alaska Native Alone	33,843		48,632		54,208	
Asian Alone	66,848		76,269		81,573	
Native Hawaiian and Other Pacific Islan	61,501		52,855		56,675	
Some Other Race Alone	40,859		34,452		35,838	
Two or More Races	50,790		55,918		59,075	
Hispanic or Latino	48,120		40,240		41,728	
Not Hispanic or Latino	71,884		81,227		84,716	

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Household Trend 2015

Retail Gap

Radius 2: , 0.00 - 10.00 Miles, Total

Description	2010 Census	%	2015 Estimate	%	2020 Projection	%
Households by Household Type and Size						
Nonfamily Households	53,936		59,404		64,182	
1-person	43,107	79.92%	47,729	80.35%	51,724	80.59%
2-person	8,747	16.22%	9,374	15.78%	9,964	15.52%
3-person	1,291	2.39%	1,449	2.44%	1,578	2.46%
4-person	462	0.86%	487	0.82%	513	0.80%
5-person	197	0.37%	215	0.36%	235	0.37%
6-person	78	0.14%	89	0.15%	100	0.16%
7-or-more-person	55	0.10%	61	0.10%	68	0.11%
Family Households	152,563		168,140		181,885	
2-person	50,401	33.04%	54,878	32.64%	59,169	32.53%
3-person	37,076	24.30%	41,168	24.48%	44,594	24.52%
4-person	38,867	25.48%	41,615	24.75%	44,459	24.44%
5-person	16,545	10.84%	19,022	11.31%	20,822	11.45%
6-person	6,060	3.97%	7,285	4.33%	8,178	4.50%
7-or-more-person	3,615	2.37%	4,172	2.48%	4,663	2.56%

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Prepared For: City of Johns Creek

Household Trend 2015

Retail Gap

Radius 3: , 0.00 - 15.00 Miles, Total

Description	2010 Census	2015 Estimate	%Change 2010-2015	2020 Projection	%Change 2015-2020
Universe Totals					
Population	1,212,794	1,328,256	9.52%	1,430,718	7.71%
Households	431,789	471,803	9.27%	507,907	7.65%
Families	309,280	337,672	9.18%	363,391	7.62%
Housing Units	466,876	507,402	8.68%	543,815	7.18%
Group Quarters Population	6,234	5,871	-5.82%	5,506	-6.21%

Description	2000 Census	%	2015 Estimate	%	2020 Projection	%
Total Households by Income	343,150		471,803		507,907	
Income Less than $15,000	20,747	6.05%	39,918	8.46%	41,888	8.25%
Income $15,000 - $24,999	22,626	6.59%	41,824	8.86%	43,591	8.58%
Income $25,000 - $34,999	31,291	9.12%	42,885	9.09%	45,178	8.89%
Income $35,000 - $49,999	50,994	14.86%	57,078	12.10%	60,514	11.91%
Income $50,000 - $74,999	74,041	21.58%	80,498	17.06%	85,619	16.86%
Income $75,000 - $99,999	52,766	15.38%	57,204	12.12%	61,483	12.11%
Income $100,000 - $124,999	34,353	10.01%	43,613	9.24%	46,903	9.23%
Income $125,000 - $149,999	18,572	5.41%	29,454	6.24%	32,684	6.44%
Income $150,000 - $199,999	19,066	5.56%	37,098	7.86%	40,551	7.98%
Income $200,000 - $249,999	8,673	2.53%	13,252	2.81%	16,464	3.24%
Income $250,000 - $499,999	7,387	2.15%	20,336	4.31%	22,633	4.46%
Income $500,000 or more	2,633	0.77%	8,644	1.83%	10,399	2.05%
Average Household Income	$83,956		$94,222		$96,903	
Median Household Income	$65,504		$66,832		$68,332	
Median HH Income by Single-Class. Race						
White Alone	70,541		80,292		83,431	
Black or African American Alone	47,683		46,885		48,108	
Amer Indian and Alaska Native Alone	42,562		47,152		49,434	
Asian Alone	58,737		68,550		72,008	
Native Hawaiian and Other Pacific Islan	60,498		51,002		54,787	
Some Other Race Alone	43,889		32,317		33,264	
Two or More Races	50,476		52,803		55,350	
Hispanic or Latino	47,733		37,432		38,670	
Not Hispanic or Latino	67,015		72,534		74,530	

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Household Trend 2015

Retail Gap

Radius 3: , 0.00 - 15.00 Miles, Total

Description	2010 Census	%	2015 Estimate	%	2020 Projection	%
Households by Household Type and Size						
Nonfamily Households	122,509		134,131		144,516	
1-person	96,847	79.05%	107,054	79.81%	115,990	80.26%
2-person	20,174	16.47%	21,195	15.80%	22,253	15.40%
3-person	3,213	2.62%	3,474	2.59%	3,716	2.57%
4-person	1,267	1.03%	1,317	0.98%	1,377	0.95%
5-person	607	0.50%	648	0.48%	694	0.48%
6-person	236	0.19%	266	0.20%	292	0.20%
7-or-more-person	165	0.13%	177	0.13%	194	0.13%
Family Households	309,280		337,672		363,391	
2-person	106,124	34.31%	114,858	34.01%	123,419	33.96%
3-person	72,868	23.56%	80,287	23.78%	86,598	23.83%
4-person	74,199	23.99%	78,902	23.37%	83,906	23.09%
5-person	33,577	10.86%	37,735	11.18%	40,919	11.26%
6-person	13,223	4.28%	15,476	4.58%	17,140	4.72%
7-or-more-person	9,288	3.00%	10,413	3.08%	11,409	3.14%

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RMP Opportunity Gap - Retail Stores

Retail Gap

Radius 1: , 0.00 - 5.00 Miles, Total

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales & Eating, Drinking Places	3,371,711,678	2,242,887,994	1,128,823,684
Motor Vehicle & Parts Dealers-441	640,562,721	244,880,704	395,682,017
Automotive Dealers-4411	533,327,871	158,543,116	374,784,755
Other Motor Vehicle Dealers-4412	56,147,272	30,337,504	25,809,768
Automotive Parts/Accessories, Tire Stores-4413	51,087,578	56,000,083	(4,912,505)
Furniture & Home Furnishings Stores-442	73,621,895	23,157,190	50,464,705
Furniture Stores-4421	40,059,678	5,342,335	34,717,343
Home Furnishing Stores-4422	33,562,217	17,814,856	15,747,361
Electronics & Appliances Stores-443	64,301,820	51,924,607	12,377,213
Appliance, TV, Electronics Stores-44311	49,755,153	38,660,318	11,094,835
Household Appliances Stores-443111	8,533,715	1,467,544	7,066,171
Radio, Television, Electronics Stores-443112	41,221,437	37,192,774	4,028,663
Computer & Software Stores-44312	13,084,745	11,287,574	1,797,171
Camera & Photographic Equipment Stores-44313	1,461,923	1,976,716	(514,793)
Building Material, Garden Equipment Stores -444	363,091,072	252,094,525	110,996,547
Building Material & Supply Dealers-4441	313,371,115	225,470,236	87,900,879
Home Centers-44411	127,354,114	123,308,246	4,045,868
Paint & Wallpaper Stores-44412	5,421,987	5,611,502	(189,515)
Hardware Stores-44413	30,557,215	4,587,456	25,969,759
Other Building Materials Dealers-44419	150,037,799	91,963,032	58,074,767
Building Materials, Lumberyards-444191	55,375,598	34,394,558	20,981,040
Lawn/Garden Equipment/Supplies Stores-4442	49,719,956	26,624,290	23,095,666
Outdoor Power Equipment Stores-44421	14,567,325	1,174,367	13,392,958
Nursery & Garden Centers-44422	35,152,631	25,449,923	9,702,708
Food & Beverage Stores-445	385,481,398	509,656,752	(124,175,354)
Grocery Stores-4451	251,333,754	479,674,963	(228,341,209)
Supermarkets, Grocery Stores-44511	235,832,747	476,560,309	(240,727,562)
Convenience Stores-44512	15,501,007	3,114,653	12,386,354
Specialty Food Stores-4452	30,869,007	1,004,590	29,864,417
Beer, Wine & Liquor Stores-4453	103,278,637	28,977,199	74,301,438
Health & Personal Care Stores-446	175,714,555	116,666,616	59,047,939
Pharmacies & Drug Stores-44611	139,496,219	88,862,695	50,633,524
Cosmetics, Beauty Supplies, Perfume Stores-44612	12,142,512	1,663,042	10,479,470
Optical Goods Stores-44613	8,565,281	5,553,958	3,011,323
Other Health & Personal Care Stores-44619	15,510,543	20,586,921	(5,076,378)

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RMP Opportunity Gap - Retail Stores

Retail Gap

Radius 1: , 0.00 - 5.00 Miles, Total

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	289,927,538	94,659,794	195,267,744
Gasoline Stations with Convenience Stores-44711	208,940,457	87,032,993	121,907,464
Other Gasoline Stations-44719	80,987,081	7,626,802	73,360,279
Clothing & Clothing Accessories Stores-448	179,520,441	45,929,219	133,591,222
Clothing Stores-4481	91,140,836	22,791,272	68,349,564
Men's Clothing Stores-44811	4,409,947	1,631,907	2,778,040
Women's Clothing Stores-44812	20,437,819	4,454,538	15,983,281
Children's, Infants' Clothing Stores-44813	5,450,124	2,017,999	3,432,125
Family Clothing Stores-44814	48,993,341	9,740,402	39,252,939
Clothing Accessories Stores-44815	4,033,891	984,436	3,049,455
Other Clothing Stores-44819	7,815,714	3,961,990	3,853,724
Shoe Stores-4482	13,047,625	3,710,040	9,337,585
Jewelry, Luggage, Leather Goods Stores-4483	75,331,979	19,427,907	55,904,072
Jewelry Stores-44831	68,677,702	19,427,907	49,249,795
Luggage & Leather Goods Stores-44832	6,654,277	0	6,654,277
Sporting Goods, Hobby, Book, Music Stores-451	65,904,568	29,876,808	36,027,760
Sporting Goods, Hobby, Musical Inst Stores-4511	56,336,164	26,428,966	29,907,198
Sporting Goods Stores-45111	29,680,552	8,405,296	21,275,256
Hobby, Toy & Game Stores-45112	15,674,550	14,660,006	1,014,544
Sewing,Needlework & Piece Goods Stores-45113	4,653,365	1,571,644	3,081,721
Musical Instrument & Supplies Stores-45114	6,327,697	1,792,020	4,535,677
Book, Periodical & Music Stores-4512	9,568,405	3,447,841	6,120,564
Book Stores & News Dealers-45121	8,242,018	2,570,107	5,671,911
Book Stores-451211	7,415,089	2,497,373	4,917,716
News Dealers & Newsstands-451212	826,929	72,733	754,196
Prerecorded Tape, CD, Record Stores-45122	1,326,387	877,734	448,653
General Merchandise Stores-452	388,494,183	167,421,187	221,072,996
Department Stores, Excl Leased Departments-4521	174,266,490	19,617,766	154,648,724
Other General Merchandise Stores-4529	214,227,694	147,803,421	66,424,273
Miscellaneous Store Retailers-453	87,734,967	46,267,644	41,467,323
Florists-4531	3,528,218	888,661	2,639,557
Office Supplies, Stationery, Gift Stores-4532	44,740,118	28,148,589	16,591,529
Office Supplies & Stationery Stores-45321	21,760,400	19,268,854	2,491,546
Gift, Novelty & Souvenir Stores-45322	22,979,719	8,879,735	14,099,984
Used Merchandise Stores-4533	7,648,145	2,995,527	4,652,618
Other Miscellaneous Store Retailers-4539	31,818,486	14,234,867	17,583,619
Non-Store Retailers-454	294,626,764	278,733,357	15,893,407

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RMP Opportunity Gap - Retail Stores

Retail Gap

Radius 1: ,0.00 - 5.00 Miles, Total

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity Gap/Surplus
Foodservice & Drinking Places-722	362,729,756	381,619,591	(18,889,835)
Full-Service Restaurants-7221	165,416,261	154,435,449	10,980,812
Limited-Service Eating Places-7222	143,458,292	197,050,693	(53,592,401)
Special Foodservices-7223	39,482,909	26,744,566	12,738,343
Drinking Places -Alcoholic Beverages-7224	14,372,295	3,388,883	10,983,412
GAFO *	816,583,026	346,457,600	470,125,426
General Merchandise Stores-452	388,494,183	167,421,187	221,072,996
Clothing & Clothing Accessories Stores-448	179,520,441	45,929,219	133,591,222
Furniture & Home Furnishings Stores-442	73,621,895	23,157,190	50,464,705
Electronics & Appliances Stores-443	64,301,820	51,924,607	12,377,213
Sporting Goods, Hobby, Book, Music Stores-451	65,904,568	29,876,808	36,027,760
Office Supplies, Stationery, Gift Stores-4532	44,740,118	28,148,589	16,591,529

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RMP Opportunity Gap - Retail Stores

Retail Gap

Radius 2: , 0.00 - 10.00 Miles, Total

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales & Eating, Drinking Places	11,594,669,922	15,441,366,234	(3,846,696,312)
Motor Vehicle & Parts Dealers-441	2,177,102,349	4,315,387,463	(2,138,285,114)
Automotive Dealers-4411	1,819,675,890	3,921,685,668	(2,102,009,778)
Other Motor Vehicle Dealers-4412	187,518,487	129,103,805	58,414,682
Automotive Parts/Accessories, Tire Stores-4413	169,907,972	264,597,990	(94,690,018)
Furniture & Home Furnishings Stores-442	241,731,557	265,940,474	(24,208,917)
Furniture Stores-4421	130,657,722	117,743,145	12,914,577
Home Furnishing Stores-4422	111,073,835	148,197,329	(37,123,494)
Electronics & Appliances Stores-443	217,896,864	271,821,377	(53,924,513)
Appliance, TV, Electronics Stores-44311	168,835,256	173,902,276	(5,067,020)
Household Appliances Stores-443111	28,954,496	11,851,889	17,102,607
Radio, Television, Electronics Stores-443112	139,880,760	162,050,387	(22,169,627)
Computer & Software Stores-44312	44,134,562	94,428,877	(50,294,315)
Camera & Photographic Equipment Stores-44313	4,927,047	3,490,225	1,436,822
Building Material, Garden Equipment Stores -444	1,205,964,570	1,261,976,196	(56,011,626)
Building Material & Supply Dealers-4441	1,038,505,086	1,068,281,067	(29,775,981)
Home Centers-44411	423,679,941	399,553,548	24,126,393
Paint & Wallpaper Stores-44412	17,680,654	17,633,819	46,835
Hardware Stores-44413	103,354,586	59,252,692	44,101,894
Other Building Materials Dealers-44419	493,789,906	591,841,008	(98,051,102)
Building Materials, Lumberyards-444191	182,539,677	221,351,050	(38,811,373)
Lawn/Garden Equipment/Supplies Stores-4442	167,459,484	193,695,129	(26,235,645)
Outdoor Power Equipment Stores-44421	47,805,131	53,816,926	(6,011,795)
Nursery & Garden Centers-44422	119,654,353	139,878,203	(20,223,850)
Food & Beverage Stores-445	1,366,198,634	1,348,234,361	17,964,273
Grocery Stores-4451	891,041,733	1,232,205,383	(341,163,650)
Supermarkets, Grocery Stores-44511	835,062,440	1,216,804,258	(381,741,818)
Convenience Stores-44512	55,979,293	15,401,125	40,578,168
Specialty Food Stores-4452	109,346,761	25,715,284	83,631,477
Beer, Wine & Liquor Stores-4453	365,810,140	90,313,694	275,496,446
Health & Personal Care Stores-446	616,402,360	571,414,467	44,987,893
Pharmacies & Drug Stores-44611	490,874,012	399,563,168	91,310,844
Cosmetics, Beauty Supplies, Perfume Stores-44612	42,760,775	69,911,610	(27,150,835)
Optical Goods Stores-44613	28,157,463	42,640,592	(14,483,129)
Other Health & Personal Care Stores-44619	54,610,111	59,299,098	(4,688,987)

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Prepared By: Strategic Planning Group,

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RMP Opportunity Gap - Retail Stores

Retail Gap

Radius 2: , 0.00 - 10.00 Miles, Total

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	1,053,527,730	988,950,996	64,576,734
Gasoline Stations with Convenience Stores-44711	760,882,095	957,865,214	(196,983,119)
Other Gasoline Stations-44719	292,645,635	31,085,782	261,559,853
Clothing & Clothing Accessories Stores-448	591,387,608	682,099,118	(90,711,510)
Clothing Stores-4481	308,259,568	432,626,646	(124,367,078)
Men's Clothing Stores-44811	14,834,064	13,212,399	1,621,665
Women's Clothing Stores-44812	68,861,946	54,317,769	14,544,177
Children's, Infants' Clothing Stores-44813	18,740,671	31,083,125	(12,342,454)
Family Clothing Stores-44814	165,865,607	287,967,640	(122,102,033)
Clothing Accessories Stores-44815	13,559,530	8,278,501	5,281,029
Other Clothing Stores-44819	26,397,749	37,767,212	(11,369,463)
Shoe Stores-4482	45,502,846	51,975,489	(6,472,643)
Jewelry, Luggage, Leather Goods Stores-4483	237,625,194	197,496,983	40,128,211
Jewelry Stores-44831	215,167,531	186,907,626	28,259,905
Luggage & Leather Goods Stores-44832	22,457,664	10,589,357	11,868,307
Sporting Goods, Hobby, Book, Music Stores-451	219,286,788	229,439,515	(10,152,727)
Sporting Goods, Hobby, Musical Inst Stores-4511	188,597,214	188,759,829	(162,615)
Sporting Goods Stores-45111	99,029,331	97,339,409	1,689,922
Hobby, Toy & Game Stores-45112	53,519,706	63,401,563	(9,881,857)
Sewing,Needlework & Piece Goods Stores-45113	15,357,829	15,910,509	(552,680)
Musical Instrument & Supplies Stores-45114	20,690,348	12,108,348	8,582,000
Book, Periodical & Music Stores-4512	30,689,574	40,679,686	(9,990,112)
Book Stores & News Dealers-45121	26,301,174	33,828,159	(7,526,985)
Book Stores-451211	23,502,209	32,974,968	(9,472,759)
News Dealers & Newsstands-451212	2,798,964	853,191	1,945,773
Prerecorded Tape, CD, Record Stores-45122	4,388,400	6,851,527	(2,463,127)
General Merchandise Stores-452	1,342,503,127	1,467,492,875	(124,989,748)
Department Stores, Excl Leased Departments-4521	595,733,769	398,488,031	197,245,738
Other General Merchandise Stores-4529	746,769,358	1,069,004,844	(322,235,486)
Miscellaneous Store Retailers-453	300,605,715	227,066,965	73,538,750
Florists-4531	11,701,279	4,325,353	7,375,926
Office Supplies, Stationery, Gift Stores-4532	149,511,820	137,468,260	12,043,560
Office Supplies & Stationery Stores-45321	72,124,755	84,034,505	(11,909,750)
Gift, Novelty & Souvenir Stores-45322	77,387,065	53,433,755	23,953,310
Used Merchandise Stores-4533	25,329,387	17,948,593	7,380,794
Other Miscellaneous Store Retailers-4539	114,063,229	67,324,758	46,738,471
Non-Store Retailers-454	1,005,933,939	2,120,746,786	(1,114,812,847)

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RMP Opportunity Gap - Retail Stores

Retail Gap

Radius 2: , 0.00 - 10.00 Miles, Total

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity Gap/Surplus
Foodservice & Drinking Places-722	1,256,128,679	1,690,795,641	(434,666,962)
Full-Service Restaurants-7221	571,783,625	776,167,053	(204,383,428)
Limited-Service Eating Places-7222	497,927,017	762,951,734	(265,024,717)
Special Foodservices-7223	136,767,934	141,794,844	(5,026,910)
Drinking Places -Alcoholic Beverages-7224	49,650,104	9,882,009	39,768,095
GAFO *	2,762,317,764	3,054,261,619	(291,943,855)
General Merchandise Stores-452	1,342,503,127	1,467,492,875	(124,989,748)
Clothing & Clothing Accessories Stores-448	591,387,608	682,099,118	(90,711,510)
Furniture & Home Furnishings Stores-442	241,731,557	265,940,474	(24,208,917)
Electronics & Appliances Stores-443	217,896,864	271,821,377	(53,924,513)
Sporting Goods, Hobby, Book, Music Stores-451	219,286,788	229,439,515	(10,152,727)
Office Supplies, Stationery, Gift Stores-4532	149,511,820	137,468,260	12,043,560

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RMP Opportunity Gap - Retail Stores

Retail Gap

Radius 3: , 0.00 - 15.00 Miles, Total

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity Gap/Surplus
Total Retail Sales & Eating, Drinking Places	22,876,084,454	25,448,713,888	(2,572,629,434)
Motor Vehicle & Parts Dealers-441	4,276,307,949	6,677,341,871	(2,401,033,922)
Automotive Dealers-4411	3,578,031,009	5,948,889,641	(2,370,858,632)
Other Motor Vehicle Dealers-4412	367,299,901	320,475,508	46,824,393
Automotive Parts/Accessories, Tire Stores-4413	330,977,039	407,976,722	(76,999,683)
Furniture & Home Furnishings Stores-442	466,540,129	499,216,533	(32,676,404)
Furniture Stores-4421	250,976,769	237,686,235	13,290,534
Home Furnishing Stores-4422	215,563,360	261,530,298	(45,966,938)
Electronics & Appliances Stores-443	425,366,280	503,198,436	(77,832,156)
Appliance, TV, Electronics Stores-44311	329,878,058	354,263,857	(24,385,799)
Household Appliances Stores-443111	56,745,263	32,904,375	23,840,888
Radio, Television, Electronics Stores-443112	273,132,794	321,359,483	(48,226,689)
Computer & Software Stores-44312	85,889,103	138,452,930	(52,563,827)
Camera & Photographic Equipment Stores-44313	9,599,120	10,481,648	(882,528)
Building Material, Garden Equipment Stores -444	2,351,088,876	2,142,665,271	208,423,605
Building Material & Supply Dealers-4441	2,022,729,864	1,805,173,197	217,556,667
Home Centers-44411	825,122,952	669,935,013	155,187,939
Paint & Wallpaper Stores-44412	34,306,199	37,297,340	(2,991,141)
Hardware Stores-44413	202,445,625	86,719,145	115,726,480
Other Building Materials Dealers-44419	960,855,087	1,011,221,698	(50,366,611)
Building Materials, Lumberyards-444191	354,666,861	378,201,221	(23,534,360)
Lawn/Garden Equipment/Supplies Stores-4442	328,359,012	337,492,074	(9,133,062)
Outdoor Power Equipment Stores-44421	93,305,709	152,894,190	(59,588,481)
Nursery & Garden Centers-44422	235,053,302	184,597,884	50,455,418
Food & Beverage Stores-445	2,737,616,324	2,271,782,741	465,833,583
Grocery Stores-4451	1,788,356,363	2,066,840,315	(278,483,952)
Supermarkets, Grocery Stores-44511	1,675,292,870	2,035,969,739	(360,676,869)
Convenience Stores-44512	113,063,493	30,870,576	82,192,917
Specialty Food Stores-4452	219,267,841	44,733,616	174,534,225
Beer, Wine & Liquor Stores-4453	729,992,121	160,208,809	569,783,312
Health & Personal Care Stores-446	1,239,865,976	1,018,605,237	221,260,739
Pharmacies & Drug Stores-44611	989,051,740	756,661,064	232,390,676
Cosmetics, Beauty Supplies, Perfume Stores-44612	86,253,702	116,665,635	(30,411,933)
Optical Goods Stores-44613	54,515,929	58,600,009	(4,084,080)
Other Health & Personal Care Stores-44619	110,044,604	86,678,530	23,366,074

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RMP Opportunity Gap - Retail Stores

Retail Gap

Radius 3: , 0.00 - 15.00 Miles, Total

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity Gap/Surplus
Gasoline Stations-447	2,118,398,914	2,031,474,914	86,924,000
Gasoline Stations with Convenience Stores-44711	1,532,369,741	1,937,426,647	(405,056,906)
Other Gasoline Stations-44719	586,029,173	94,048,268	491,980,905
Clothing & Clothing Accessories Stores-448	1,137,452,837	1,051,573,627	85,879,210
Clothing Stores-4481	599,900,826	681,342,240	(81,441,414)
Men's Clothing Stores-44811	28,900,608	18,744,165	10,156,443
Women's Clothing Stores-44812	133,515,175	107,857,569	25,657,606
Children's, Infants' Clothing Stores-44813	36,798,706	48,987,529	(12,188,823)
Family Clothing Stores-44814	323,075,549	429,664,245	(106,588,696)
Clothing Accessories Stores-44815	26,267,413	18,194,063	8,073,350
Other Clothing Stores-44819	51,343,374	57,894,670	(6,551,296)
Shoe Stores-4482	89,718,115	90,064,382	(346,267)
Jewelry, Luggage, Leather Goods Stores-4483	447,833,897	280,167,004	167,666,893
Jewelry Stores-44831	404,054,034	265,384,994	138,669,040
Luggage & Leather Goods Stores-44832	43,779,862	14,782,010	28,997,852
Sporting Goods, Hobby, Book, Music Stores-451	424,710,860	344,781,664	79,929,196
Sporting Goods, Hobby, Musical Inst Stores-4511	366,115,870	283,708,551	82,407,319
Sporting Goods Stores-45111	191,604,257	143,976,714	47,627,543
Hobby, Toy & Game Stores-45112	104,731,518	97,253,015	7,478,503
Sewing,Needlework & Piece Goods Stores-45113	29,941,858	20,617,603	9,324,255
Musical Instrument & Supplies Stores-45114	39,838,236	21,861,219	17,977,017
Book, Periodical & Music Stores-4512	58,594,990	61,073,113	(2,478,123)
Book Stores & News Dealers-45121	50,108,337	51,422,000	(1,313,663)
Book Stores-451211	44,619,693	48,424,975	(3,805,282)
News Dealers & Newsstands-451212	5,488,643	2,997,025	2,491,618
Prerecorded Tape, CD, Record Stores-45122	8,486,653	9,651,113	(1,164,460)
General Merchandise Stores-452	2,655,014,163	2,391,239,496	263,774,667
Department Stores, Excl Leased Departments-4521	1,169,617,558	747,638,507	421,979,051
Other General Merchandise Stores-4529	1,485,396,605	1,643,600,989	(158,204,384)
Miscellaneous Store Retailers-453	591,417,925	371,669,231	219,748,694
Florists-4531	22,833,579	11,493,901	11,339,678
Office Supplies, Stationery, Gift Stores-4532	291,030,079	205,340,947	85,689,132
Office Supplies & Stationery Stores-45321	139,837,420	128,202,043	11,635,377
Gift, Novelty & Souvenir Stores-45322	151,192,659	77,138,904	74,053,755
Used Merchandise Stores-4533	48,927,975	38,494,564	10,433,411
Other Miscellaneous Store Retailers-4539	228,626,291	116,339,819	112,286,472
Non-Store Retailers-454	1,982,553,495	3,232,310,948	(1,249,757,453)

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RMP Opportunity Gap - Retail Stores

Retail Gap

Radius 3: , 0.00 - 15.00 Miles, Total

Retail Stores	2015 Demand (Consumer Expenditures)	2015 Supply (Retail Sales)	Opportunity Gap/Surplus
Foodservice & Drinking Places-722	2,469,750,726	2,912,853,919	(443,103,193)
Full-Service Restaurants-7221	1,122,816,872	1,367,841,915	(245,025,043)
Limited-Service Eating Places-7222	979,966,734	1,275,318,511	(295,351,777)
Special Foodservices-7223	269,074,286	240,802,199	28,272,087
Drinking Places -Alcoholic Beverages-7224	97,892,834	28,891,294	69,001,540
GAFO *	5,400,114,348	4,995,350,703	404,763,645
General Merchandise Stores-452	2,655,014,163	2,391,239,496	263,774,667
Clothing & Clothing Accessories Stores-448	1,137,452,837	1,051,573,627	85,879,210
Furniture & Home Furnishings Stores-442	466,540,129	499,216,533	(32,676,404)
Electronics & Appliances Stores-443	425,366,280	503,198,436	(77,832,156)
Sporting Goods, Hobby, Book, Music Stores-451	424,710,860	344,781,664	79,929,196
Office Supplies, Stationery, Gift Stores-4532	291,030,079	205,340,947	85,689,132

Nielsen' RMP data is derived from two major sources of information. The demand data is derived from the Consumer Expenditure Survey (CE Survey, or CEX), which is fielded by the U.S. Bureau of Labor Statistics (BLS). The supply data is derived from the Census of Retail Trade (CRT), which is made available by the U.S. Census. Additional data sources are incorporated to create both supply and demand estimates.

The difference between demand and supply represents the opportunity gap or surplus available for each retail store type in the specified reporting geography. When this difference is positive (demand is greater than the supply), there is an opportunity gap for that retail store type; when the difference is negative (supply is greater than demand), there is a surplus.

*GAFO (General Merchandise, Apparel, Furniture and Other) represents sales at stores that sell merchandise normally sold in department stores. This category is not included in Total Retail Sales Including Eating and Drinking Places.

APPENDIX B: COMMUNITY DEVELOPMENT DISTRICTS

Community Improvement Districts

What are Community Improvement Districts (CIDs)?
Authorized by Article IX, Section VII of the Georgia Constitution, a community improvement district (CID) is a mechanism for funding certain governmental services including street and road construction and maintenance, parks and recreation, storm water and sewage systems, water systems, public transportation systems, and other services and facilities. The administrative body of the CID, which can be the city governing authority, may levy taxes, fees and assessments within the CID, not to exceed 2.5 percent of the assessed value of the real property. Such taxes, fees and assessments may only be levied on real property that is used for non-residential purposes and revenues may be used only to provide governmental services and facilities within the CID. Bonded debt is permitted, but such debt may not be considered an obligation of the state or any other unit of government other than the CID.

How is a CID created?
The General Assembly may create a CID by local legislation. The creation of a CID is conditioned on approval of the municipal government if the CID would be entirely within the municipality and approval from both the municipal government and the county government if the CID would be partially in the incorporated area and partially within the unincorporated area. Additionally, the creation of a CID is contingent on receiving the written consent of a majority of the owners of the real property within the CID that would be subject to CID taxes, fees and assessments, as well as the owners of the real property within the CID that constitutes 75 percent or more by value of all real property within the CID which will be subject to CID taxes, fees and assessments.

APPENDIX C: EXAMPLE OF LOCAL INCENTIVE (ORMOND BEACH)

ATTACHMENT A
ORMOND BEACH ECONOMIC DEVELOPMENT
GROWTH ASSISTANCE AGREEMENT

Job Projection and Growth Assistance Funding

The maximum growth assistance funding payable to _____ by the City will be $_____ for creation of ___ full-time jobs at the Project Site.

_______ is projecting the creation of____ full-time jobs over a three (3) year period with the average wage of the new employees to be approximately $________. The funding grant ratio for ___________ is based on the average annual salaries/wages of the _____ full-time employees and/or full-time equivalents in relation to the average Volusia County salary/wage rate, which is $33,494 or Hourly rate of $16.10 as reference in Attachment A1, Enterprise Florida Average Annual Wage Data.

The following are the proposed incentive levels for the projected jobs and related wage levels proposed by ________ as indicated on Attachment A 2, City of Ormond Beach Growth Assistance Application.

Growth Assistance Funding Level (based on the average annual salaries/wages of the ____ new employees created by ______).
Projected New Jobs over a 3 year period
Annual Salary/wages 150%+(of average Vol. Co. wage rate) = $1,500/new job created
Annual Salary/wages 100%-149% (of average Vol. Co. wage rate) = $1,000/new job created
Annual Salary/wages less than 100% (of average Vol. Co. wage rate) = $500/new job created

Estimated Jobs, Funding Level, and Payment Allocation Schedule

Year Jobs to be Created	Projected Jobs	Funding * Ratio	$ Amount	Estimated Payment Year
Year 1 (2014)		$00/job	$ 000	(2015)
Year 2 (2015)		$00/job	$ 000	(2016)
Year 3 (2016)		$00/job	$ 000	(2017)
Total			$ 000	

*Based on ______ estimated average annual wage of ($000) for the new ___ new jobs, which is more than % (_____) of the Volusia County annual average wage of $33,494 and hourly wage of $16.10 (Attachment A 1, Enterprise Florida State Incentives Average Wage Requirements, dated 12-26-13.

The CITY shall allocate a maximum of $000 for the ____ full-time jobs projected by ____ and funds will be disbursed dependent upon ______ creation of jobs as indicated above and in accordance with the ____ Growth Assistance Agreement.

In determining the average wage levels, ____ shall provide the City with wage documentation at each annual submission for request of growth assistance funding and apply the appropriate wage level incentive.

______ shall be eligible to receive annual growth assistance funding payments based on performance during the previous calendar/tax years. However, if at the end of the third performance year the maximum funds have not been expended, the City will determine the average wage of all the new jobs created over the three year period. If the average wage for the number of jobs created exceeds 100% of the average Volusia County wage rate, additional funds may be made available to _______ up to the maximum funding available as shown in the following example:

Example:
Year 1: 10 new jobs, with a group average wage level of $58,000 (173%) of the average Volusia County wages ($33,494). The incentive funding level is thus $1,500/job for a total of $15,000.
Year 2: 10 new jobs with a group average wage level of $37,000 (110%) of the average Volusia County wages. The incentive funding level is thus $1,000/job for a total of $10,000.
Year 3: 10 new jobs, with a group average wage level of $53,000 (158%) of the average Volusia County wages. The incentive funding level is thus $1,500/job for a total of $15,000.

In this example, _______ would have been provided $40,000 over the individual 3 years. However, when calculating the aggregate 3 year average wages for the 30 new jobs created by _____ the average annual wage is $51,000 or (152%) of the average Volusia County wage, therefore _______ would be eligible for $45,000 based on the above funding levels and as authorized by the City for this project.

As this example indicates, the final job creation funding is based on the jobs and wage level over the aggregate 3 years and may require an adjustment of the funding that was allocated by the City during the individual 3 years.

Should the City participate in providing the 20% local match for the State of Florida Qualified Tax Incentive program, 20% of the eligible growth assistance funding will be deducted and used in the QTI local match.

APPENDIX D: EXISTING INDUSTRY SURVEY (EXAMPLE)

Example: MANUFACTURING/RELATED INDUSTRIES CONFIDENTIAL SURVEY

Please complete this survey and return promptly to Pasco Economic Development Council. Survey results will be used to help improve the business climate in Pasco County. No information will be released that would identify you or your company. All respondents will receive a free copy of the survey report. If you have any questions, please contact PEDC at (813)920-6480. We appreciate your time and cooperation.

Company__________________________ Telephone (_____) __________________

Address__________________________ Fax (_____) ______________________

City_____________________________ State_______________ Zip______________

Contact__________________________ E-Mail:__________________________

Title____________________________ Website Address: __________________

A. Nature of Business and Ownership

1. Primary Business Type: ❒ Manufacturing ❒ Distribution ❒ Processing ❒Technology ❒Construction
2. NAICS Code for primary nature of business: ____________

   A list of NAICS Codes can be found at the following link: http://www.naics.com/search.htm
3. Please list the major products/services that you produce:

   a) ____

   b) ____

   c) ____

   Are these products considered "green"? (e.g. energy efficiency, renewable energy) ❒Yes ❒ No
4. Number of years company has been in Pasco County: ______________
5. Is the company: ❒privately owned or ❒publicly traded?
6. If privately owned, is the company: ❒Veteran ❒Woman ❒Minority owned?
7. If the company has multiple locations, how many are there? ______________________________
8. Parent Company: ___________________________

B. Market

1. Is the company's primary market: ❒Local ❒Regional ❒National ❒International?
2. Is the company's primary product/service: ❒Emerging ❒Growing ❒Maturing ❒Declining?
3. Is the market share of the company's key products: ❒Increasing ❒Stable ❒Decreasing?
4. Where are your competitors located? (City and Country) ______________________________
5. What were your total gross sales in your last fiscal year? $______________________________
6. During the past year, have your company's sales: ❒ Increased ❒ Decreased ❒ Remained the same
7. Are new products/services anticipated in the next two years? ❒Yes ❒No
8. Do you sell to the Federal Government or to a prime contractor of the Federal Government? ❒Yes ❒No
9. Is your product sold to (or in the supply chain of) the Department of Defense? ❒Yes ❒No
10. Do you sell to local or state government? ❒Yes ❒No

C. Facilities

1. What is the size of the company's Pasco facility? Land _______ #acres Building(s) _________ #Sq. Feet
2. Is this facility: ❒Leased ❒Owned If leased, when does lease expire? (month/year) ______________
3. Does the company plan to expand in the next three years? ❒Yes ❒No

4. If yes, estimated $ investment: ____________ Estimated number of jobs added or lost (-): ___________

Facility size increase: _______________ Estimated date of expansion (mo./yr.):_______________

D. Workforce

1. Number of company's Full-time Pasco employees ___________ Part-time Pasco employees ___________
2. Is this: ❐ higher ❐ same ❐ lower than last year?
3. What is your total annual Pasco payroll (excluding payroll taxes and benefits)? __________________
4. On a scale of 1 (low) to 5 (high), how do you rate the availability of workers in this area: _____
5. On a scale of 1 (low) to 5 (high), how do you rate the quality of workers in this area: _____
6. On a scale of 1 (low) to 5 (high), how do you rate the stability of workers in this area: _____
7. On a scale of 1 (low) to 5 (high), how do you rate the productivity in this facility: _____
8. On a scale of 1 (low) to 5 (high), rate your employees with respect to the following skills:

Communication Skills _____ OSHA/Safety _____ Mechanical/Technical Skills _____
Supervisory Development _____ Computer/Technology Skills_____ Other: __________________________
Basic Writing/Math/Reading _____ Customer Service _____

9. How much do you invest annually per employee in training/skills development?

❐$0 < $250 ❐$250 - $500 ❐$500 - $1000 ❐> $1,000

10. Is this training (check all that apply): ❐ Skills Up-Grade ❐ Initial Employment Skills ❐ Remedial

E. Training and Economic Development Assistance

1. Which of the following programs are you familiar with and which have you used?	Familiar With	Have Used	Would like Information
Pasco-Hernando Community College Career and Technical Training	❐	❐	❐
Pasco-Hernando Community College Corporate Training	❐	❐	❐
Pasco District Schools Certified Career Academies	❐	❐	❐
Pasco Career Central Services for Employers	❐	❐	❐
Employee Training Cost Reimbursement	❐	❐	❐
Florida Ready-to-Work Credential Program	❐	❐	❐
Career Central Job Placement Services	❐	❐	❐
Sales Tax Incentives	❐	❐	❐
Florida Job Creation Incentive Programs	❐	❐	❐
Pasco County Job Creation Incentive Programs	❐	❐	❐
Small Business Administration Financing Programs	❐	❐	❐
Small Business Counseling/Technical Assistance	❐	❐	❐

F. Business Environment

1. Please rate the top factors below according to the impact on your business on a scale of 1 to 5, 5 being high.

	Low				*High*		*Low*				*High*
Factors	1	2	3	4	5	Factors	1	2	3	4	5
Foreign Imports	☐	☐	☐	☐	☐	Antiquated Machinery	☐	☐	☐	☐	☐
Energy Costs	☐	☐	☐	☐	☐	Economy	☐	☐	☐	☐	☐
Worker Skills	☐	☐	☐	☐	☐	Local Government Regs.	☐	☐	☐	☐	☐

Transportation	☐	☐	☐	☐	☐	Property Taxes	☐	☐	☐	☐	☐
Access to Capital	☐	☐	☐	☐	☐	State/Federal Government Regs.	☐	☐	☐	☐	☐
Domestic Competition	☐	☐	☐	☐	☐	Property Insurance	☐	☐	☐	☐	☐
Cost of Materials	☐	☐	☐	☐	☐	Employee Insurance	☐	☐	☐	☐	☐
Insufficient Space	☐	☐	☐	☐	☐	Other:	☐	☐	☐	☐	☐

2. If you plan to relocate, where would you consider a move?

❒Within Pasco County ❒Tampa Bay ❒Other: ______________________________ ❒ Not Applicable

G. Community Evaluation

1. How is the consumption of the following utilities changing for your company? *I = Increasing, S = Stable, D = Decreasing				2. Please rate your satisfaction with your utility providers. *Low* *High*				
Type of Utility	I*	S*	D*	1	2	3	4	5
A) Water	☐	☐	☐	☐	☐	☐	☐	☐
B) Sewer	☐	☐	☐	☐	☐	☐	☐	☐
C) Natural Gas	☐	☐	☐	☐	☐	☐	☐	☐
D) Electric	☐	☐	☐	☐	☐	☐	☐	☐
E) Telecom (voice)	☐	☐	☐	☐	☐	☐	☐	☐
F) Cellular service	☐	☐	☐	☐	☐	☐	☐	☐
G) Internet access	☐	☐	☐	☐	☐	☐	☐	☐
H) Internet speed	☐	☐	☐	☐	☐	☐	☐	☐

3. Please rate the quality of the following services provided by the community on a scale of 1 to 5, 5 being high.

	Low				*High*			*Low*				*High*	
Type of Service	1	2	3	4	5	N/A	Type of Service	1	2	3	4	5	N/A
Police protection	☐	☐	☐	☐	☐	☐	College(s) & university(ies)	☐	☐	☐	☐	☐	☐
Fire protection	☐	☐	☐	☐	☐	☐	Public transportation	☐	☐	☐	☐	☐	☐
Ambulance service	☐	☐	☐	☐	☐	☐	Traffic control	☐	☐	☐	☐	☐	☐
Health care services	☐	☐	☐	☐	☐	☐	Streets and roads (local)	☐	☐	☐	☐	☐	☐
Child care services	☐	☐	☐	☐	☐	☐	Highways (State & Federal)	☐	☐	☐	☐	☐	☐
School (K-12)	☐	☐	☐	☐	☐	☐	Airline passenger service	☐	☐	☐	☐	☐	☐
Tech college	☐	☐	☐	☐	☐	☐	Air cargo service	☐	☐	☐	☐	☐	☐
Community college	☐	☐	☐	☐	☐	☐	Trucking	☐	☐	☐	☐	☐	☐

CONFIDENTIALITY STATEMENT
Pursuant to Section 288.075 of the Florida Statutes, I hereby request that any information contained herein concerning our plans, intentions or interest to locate, relocate or expand any of our business activities in this State be treated confidentially.

Signature: ______________________________ Date: ______________________

Your time and cooperation are sincerely appreciated…THANK YOU!

Return to: Pasco Economic Development Council, 16506 Pointe Village Dr., Suite 101, Lutz, FL 33558
Phone: (813) 920-6480 **Fax: (813) 926-0829**

PASCO Economic Development Council

APPENDIX E: EXISTING INDUSTRY SURVEY

DEC. 2010

Pasco Economic Development Council
2010 Existing Industry Annual Survey Results

PASCO
Economic Development Council

Following are the results of our 2010 Existing Industry Annual Survey. Each year the PEDC surveys Pasco industries to get a "snapshot" look at different issues that we can use to identify industry needs and trends among the respondents. Of the 383 surveys distributed, sixty-one (61) surveys were returned and used in this year's analysis.

Tampa Bay Regional Planning Council (TBRPC) provided an economic impact analysis of the information generated from the PEDC Existing Industry Annual Survey. The impact analysis estimates the economic activity generated in Pasco County by companies that responded to the survey. The survey covers a wide range of industrial activities in Pasco, including the manufacture of furniture, food products, electronic equipment and plastics. TBRPC modeled the economic impacts of the sixty-one (61) surveyed firms, employing 1,783 people, on Pasco County's economy.

Number of Surveys Distributed: **383**

Number of Firms Responded: **61**

Direct Employment: **1,783**

(includes full time and full time equivalent)

Indirect and Induced Employment: **1,609**

Total Employment: **3,392**

Personal Income: **$110 Million**

Contribution to GCP: **$286 Million**

Pasco County GCP: **$7.1 Billion**

Note: This analysis is not comparable to previous year's analyses due to differences in respondents and data updates to the model. All figures are in 2009 U.S. Dollars. Previous Impact Studies used 2000 U.S. Dollars.

MISSION STATEMENT: The Pasco Economic Development Council will lead Pasco County in the creation of a sustainable and diversified economy.

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PASCO ECONOMIC DEVELOPMENT COUNCIL
16506 Pointe Village Dr., Suite 101 • Lutz, FL 33558-5255
813-926-0827 • Toll Free: 888-60-PASCO • Fax: 813-926-0829
www.pascoedc.com

Existing Industry Survey is an annual publication of Pasco Economic Development Council.

Impacts

The 1,783 employees of the surveyed firms generate (directly, indirectly, and induced) an estimated $110 million in annual household earnings and contributed $286 million to Pasco's Gross County Product (GCP). Those jobs then create 1,609 indirect and induced jobs. Indirect jobs are created through industry demand, which together induce additional jobs through household spending, for a total job impact of 3,392 jobs.

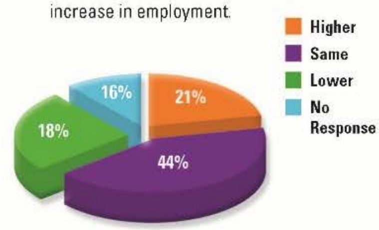
Those 3,392 jobs contribute $286 million dollars to the total Gross County Product. Economic impacts, however, are not limited to industrial output. Because significant shares of annual household earnings are spent locally, the wages earned at these jobs circulate money through different sectors of the local economy.

Wage Information

Sixty-one (61) companies reported total full time employment of **1,745**. Twenty-nine (29) reported annual payroll totaling **$43,181,923**. By calculating an average annual wage for each company it was determined the combined average annual wage reported is **$43,247**.

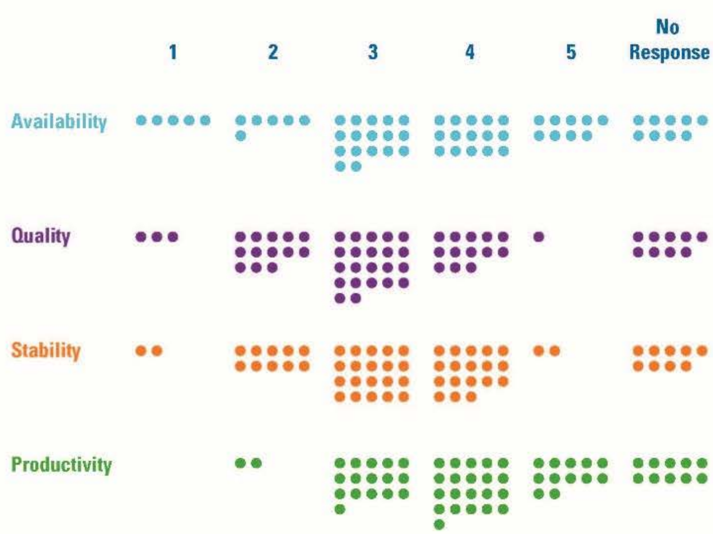
2010 Employment Changes

Of the companies reporting employment changes, **18%** experienced a decrease in their workforce while **21%** reported an increase in employment.



Rating of Workforce in Area

Respondents were asked to rate on a scale of 1 (low) to 5 (high), how they rate the availability, quality, and stability of workers in this area. They were also asked to rate the productivity in their facility. The results are shown below.



2010 Economic Impact Analysis Annual Impact Summary

Length of Time in Business (Years)

1 to 5	**29%**
6 to 10	**16%**
11 to 20	**14%**
20+	**41%**

Size of Facility (in square feet)

1-5,000	**32%**
5,001-10,000	**20%**
10,001-20,000	**20%**
20,001-30,000	**7%**
30,001-50,000	**9%**
50,001+	**13%**

Fifty-six (56) companies reported a total square footage of 1,815,566. Forty-nine percent (49%) indicated that the company plans to expand in the next three years.

Company's Primary Markets

Local	**18%**
Regional	**21%**
National	**38%**
International	**15%**
Local & Regional	**5%**
National & International	**3%**

Annual Sales

Of the 60 companies reporting, **40%** reported an increase in sales while **20%** reported consistent sales.

Product Sales to Government Agencies

Respondents were asked to indicate whether they sell to the Federal Government, Prime Contractor of the Federal Government, Local or State Government, and if their product was sold to (or in the Supply Chain of) the Department of Defense. Below is how businesses responded.

Federal Government

Yes	No	No Response
30%	**70%**	**0%**

Local or State Government

Yes	No	No Response
44%	**56%**	**0%**

Department of Defense

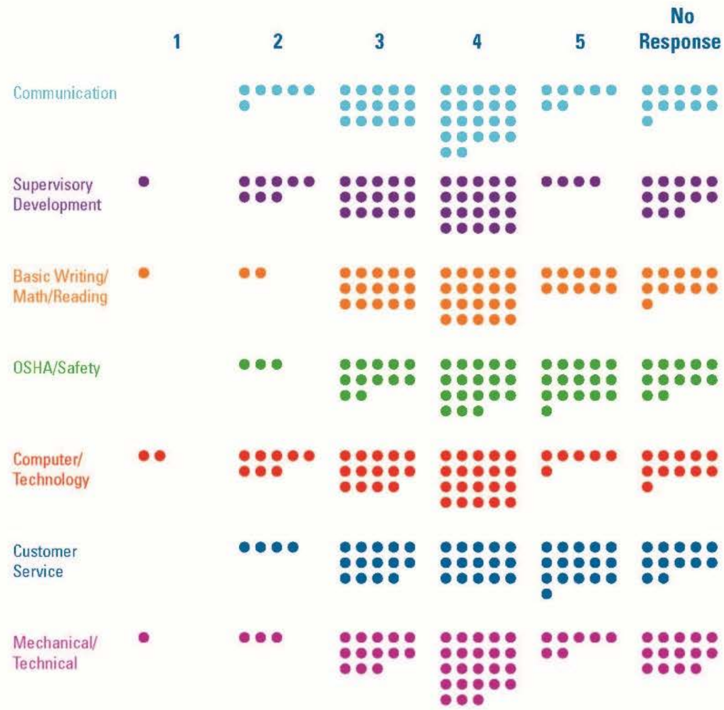
Yes	No	No Response
16%	**82%**	**2%**

Annual Training Investment per Employee

Respondents were asked to indicate how much they invest annually per employee for training/ skills development. The following graph shows employer investment per employee.

Evaluation of Employee Skills

Businesses were asked to rate on a scale of 1 (low) to 5 (high), employees with respect to certain skills. The following chart shows how businesses rated their employees.



Training and Economic Development Assistance

Businesses were asked to respond to the familiarity and use of training and economic development assistance programs in Pasco County. The results are shown below.

Programs	Familiar With	Have Used	Would Like Info	Familiar With & Would Like Info	Familiar & With Have Used	No Response
Pasco-Hernando Community College Career & Technical Training	48%	3%	10%	2%	0%	38%
Pasco-Hernando Community College Corporate Training	39%	2%	11%	2%	0%	46%
Pasco District Schools Certified Career Academies	38%	2%	11%	0%	0%	49%
Pasco Career Central Services for Employers	31%	7%	8%	0%	10%	44%
Employee Training Cost Reimbursement	26%	11%	13%	2%	3%	44%
Florida Ready-to-Work Credential Program	36%	2%	11%	0%	0%	51%
Career Central Job Placement Services	28%	15%	8%	0%	11%	38%
Sales Tax Incentives	25%	5%	20%	0%	7%	44%
Florida Job Creation Incentives	26%	3%	18%	3%	0%	49%
Pasco County Job Creation Incentives	30%	2%	20%	2%	0%	48%
Small Business Administration Financing	31%	3%	11%	0%	3%	51%
Small Business Counseling/ Technical Assistance	34%	3%	7%	0%	3%	52%

2010 Economic Impact Analysis Annual Impact Summary

Skills Up-Grade, Initial and Remedial Skills

Of the 61 respondents to the survey, thirty-one **(31)** indicated that the training is used as a skills up-grade. Twenty-six **(26)** reported that money is spent on initial employment skills. Thirteen **(13)** of the 61 respondents also indicated money is used for remedial skills training.

Utility Satisfaction

PEDC asked for respondents to rate their satisfaction with their utility providers with respect to their business. The following are how the issues were rated:

Internet Access	**1**
Electric	**2**
Water	**3**
Cellular Service	**4**
Internet Speed	**5**
Sewer	**6**
Telecom (Voice)	**7**
Natural Gas	**8**

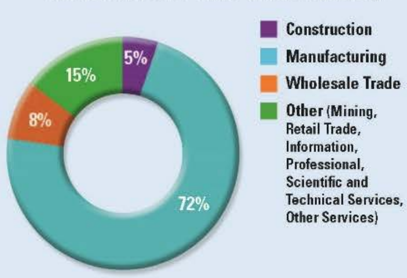
Business Environment

PEDC asked for respondents to rate the top factors according to the impact on their business. The following are how the issues were rated:

The Economy	**1**
Cost of Materials	**2**
Energy Costs	**3**
Worker Skills	**4**
Domestic Competition	**5**
Employee Insurance	**6**
State/Federal Government Regs.	**7**
Property Insurance	**8**
Local Government Regs.	**9**
Property Taxes	**10**
Transportation	**11**
Antiquated Machinery	**12**
Access to Capital	**13**
Foreign Imports	**14**
Insufficient Space	**15**

NAICS (North America Industry Classification System)

NAICS code is a six digit number used to identify U.S. industries. The first two digits correspond to the industry followed by four digits which indicates a specific sector within the industry.



Community Evaluation

Respondents were asked to select how the consumption of utilities is changing (increasing, stable, or decreasing) for their

Type of Utility	Increasing	Stable	Decreasing	No Response
Water	15%	64%	0%	21%
Sewer	11%	61%	0%	28%
Natural Gas	7%	34%	2%	57%
Electric	36%	43%	2%	20%
Telecom (Voice)	18%	48%	3%	31%
Cellular Service	26%	49%	0%	25%
Internet Access	36%	39%	2%	23%
Internet Speed	36%	36%	3%	25%

Quality of Community Services

PEDC asked for respondents to rate the quality of services provided by the community. The following are how the issues were rated:

Fire Protection	**1**	Traffic Control	**9**
Ambulance Service	**2**	Community College	**10**
Police Protection	**3**	School (K-12)	**11**
Highways (State and Federal)	**4**	Child Care Services	**12**
Trucking	**5**	Air Cargo Service	**13**
Health Care Services	**6**	Tech College	**14**
Streets and Roads (Local)	**7**	College(s) and University(ies)	
Airline Passenger Service		Public Transportation	**16**

NAICS	Subsectors	Number
11-Agriculture, Forestry, Fishing and Hunting	112-Animal Production	1
21-Mining	212-Mining (Except Oil and Gas)	1
23-Construction	238-Specialty Trade Contractor	3
31-Manufacturing	311-Food Manufacturing	3
	312-Beverage and Tobacco Product Manufacturing	4
32-Manufacturing	321-Wood Product Manufacturing	1
	323-Printing and Related Support Activities	2
	324-Petroleum and Coal Products Manufacturing	1
	325-Chemical Manufacturing	2
	326-Plastics and Rubber Products Manufacturing	5
	327-Nonmetallic Mineral Product Manufacturing	3
33-Manufacturing	332-Fabricated Metal Product Manufacturing	5
	333-Machinery Manufacturing	6
	336-Transportation Equipment Manufacturing	3
	337-Furniture and Related Product Manufacturing	1
	339-Miscellaneous Manufacturing	8
42-Wholesale Trade	422-Wholesale Trade, Nondurable Goods	2
	423-Merchant Wholesalers, Durable Goods	2
	424-Merchant Wholesalers, Nondurable Goods	1
44-Retail Trade	444-Building Material/Garden Equip./Supplies Dealers	1
51-Information	511-Publishing Industries	1
	517-Other Telecommunications	1
52-Finance and Insurance	522-Credit Intermediation and Activities	1
54-Professional, Scientific, and Technical Services	541-Professional, Scientific, and Technical Services	1
56-Administrative Support, Waste Management, and Remediation	561-Administrative and Support Services	1
	562-Waste Management and Remediation Services	1

APPENDIX F: JOHNS CREEK SHOPPING CENTER CENSUS

Shopping Centers

Common Name	Address	Inspection Date	# of Suites	# of Vacancies	% Vacant
No name (located north of City Hall)	11600 Medlock Bridge Road	7/28/15	9	1	11%
Haynes Bridge Village	9925 Haynes Bridge Road	7/27/15	29	2	7%
State Bridge Shopping Center	5779 State Bridge Road	7/31/15	6	0	0%
Shops of Warsaw	9810 Medlock Bridge Road	7/30/15	7	0	0%
Fairway Plaza	9730 Medlock Bridge Road	7/30/15	4	0	0%
Ivy Falls	10475 Medlock Bridge Road	7/30/15	14	2	14%
Northwoods Office Condos	11180 State Bridge Road	7/31/15	22	2	9%
The Terraces at Johns Creek	6375 McGinnis Ferry Road	7/31/15	9	0	0%
Johns Creek Village	11720 Medlock Bridge Road	7/28/15	35	3	9%
Johns Creek Walk	11030 Medlock Bridge Road	7/28/15	20	4	20%
Medlock Promenade	10900 Medlock Bridge Road	7/28/15	19	6	32%
Abbotts Bridge Station	10820 Abbotts Bridge Road	7/28/15	15	4	27%
Ivy Village	10450 Medlock Bridge Road	8/3/15	12	2	17%
Medlock Village Shopping Center	10350 Medlock Bridge Road	7/30/15	6	3	50%
Bella Palazzo	10305 Medlock Bridge Road	7/30/15	18	0	0%
Medlock Corners	5805 State Bridge Road	7/31/15	26	4	15%
Riverwalk Marketplace	5945 State Bridge Road	7/31/15	1	0	0%
State Bridge Corners (SBR frontage)	5950 State Bridge Road	7/31/15	12	1	8%
Medlock Crossing	9700 Medlock Bridge Road	8/3/15	28	7	25%
Johns Creek Center for the Arts & Design	10700 Jones Bridge Road	7/31/15	8	0	0%
North Bridges	10995 Jones Bridge Road	7/31/15	27	7	26%
Johns Creek Shopping Center	10875 Jones Bridge Road	7/27/15	8	0	0%
Tadka Square	11105 State Bridge Road	7/30/15	15	3	20%
Saddle Brook	10945 State Bridge Road	7/30/15	13	1	8%
State Bridge Centre	11164 State Bridge Road	7/31/15	5	0	0%
The Grand Pavilion at North Fulton	11130 State Bridge Road	7/30/15	18	14	78%
Carlyle Commons	10970 State Bridge Road	7/30/15	4	2	50%
Shops at Jones Bridge	9950 Jones Bridge Road	7/27/15	2	0	0%
Jones Bridge Promenade	9945 Jones Bridge Road	7/27/15	15	9	60%
Camden Village	3719 Old Alabama Road	7/27/15	11	0	0%
Haynes Market	3000 Haynes Bridge Road	7/27/15	35	3	9%
Old Alabama Square	3005 Old Alabama Road	7/27/15	34	3	9%
Nesbit Ferry Crossing	9850 Nesbit Ferry Road	7/27/15	24	1	4%

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Shopping Centers

Common Name	Address	Inspection Date	# of Suites	# of Vacancies	% Vacant
Rivermont Station	8465 Holcomb Bridge Road	7/27/15	32	2	6%
Abbotts Village at Ocee	11585 Jones Bridge Road	7/30/15	19	8	42%
Ocee Plaza	11550 Jones Bridge Road	7/30/15	6	1	17%
Addison Plaza	11765 Jones Bridge Road	7/30/15	5	0	0%
Shoppes at Jones Bridge	11730 Jones Bridge Road	7/30/15	5	0	0%
No name (located at corner of JBR and ABR)	11705 Jones Bridge Road	7/30/15	22	2	9%
Windward Village	11877 Douglas Road	7/30/15	22	10	45%
Jones Bridge Triangle	11875 Jones Bridge Road	7/30/15	16	7	44%
Shoppes at Douglas	11890 Douglas Road	7/30/15	7	0	0%
Seven Winds	11950 Jones Bridge Road	7/30/15	17	7	41%
Palm Casual Patio Furniture	10070 Medlock Bridge Road	7/30/15	1	0	0%
Gymboree Center	11005 Jones Bridge Road	7/30/15	8	0	0%
Lakefield Center at Johns Creek	6955 McGinnis Ferry Road	7/30/15	15	0	0%
Medlock Bridge / The Forum	6000 Medlock Bridge Parkway	7/30/15	15	6	40%
No name (intersection of JBR & Ray Moss)	10800 JBR	7/27/15	5	2	40%
no photo taken	10360 Medlock Bridge Road	7/30/15	6	0	0%
State Bridge Corners (MBR frontage)	9775 Medlock Bridge Road	7/31/15	18	0	0%
no name (behind Burger King / Abbotts Village)	5075 Abbotts Bridge Road	7/30/15	4	0	0%

Totals:	734	129	18%

8/3/2015 Page 2

APPENDIX G: EXAMPLE OF A MEMORANDUM OF UNDERSTANDING

tampaBAY partnership

Memorandum of Understanding

Section One. Guiding Spirit of Intent

1.1 The Tampa Bay Partnership (TBP) and the Economic Development Organizations (EDOs) in the seven-county Tampa Bay region have recognized the strength and successes of regional collaboration and cooperation and have become partners in the process of shaping Tampa Bay's economy and ultimately, our quality of life.

1.2 It is the intent of this document to reflect a new environment for regional economic development in the Tampa Bay region. The Tampa Bay Partnership and its economic development partners understand the need for a regional business development program that identifies, coordinates and pursues significant opportunities to enhance and grow key sectors through business attraction/expansion and policy/infrastructure/resource development.

1.3 This memorandum identifies the scope of the partnership between the TBP and the EDOs. This document is neither all-inclusive nor legally binding, rather a document offering guidelines for the process of developing and sustaining mutually understood roles and responsibilities for the TBP and the individual EDOs as we create a new way of doing regional economic development.

Tampa Bay Partnership Mission Statement:

The Tampa Bay Partnership is the regional economic development organization that works with its partners to market the region nationally and internationally, to conduct regional research and to coordinate efforts to influence business and government issues that impact economic growth and development

Section Two. Governance

2.1. Each EDO will have a seat on the Policy Board of Directors, a seat on the Economic Development Partners Council, a seat on the Economic Development Marketing Committee, and offered seats on any other advisory councils of interest. (commensurate with investment)

2.2. The Economic Development Marketing Committee will be chaired by a member EDO selected by the Chair of the Tampa Bay Partnership. The Economic Development Partners Council may make recommendations to the chair for the Marketing Committee chair.

2.3. The Economic Development Partners Council (chaired by an EDO executive) will have a seat on the Partnership's Executive Committee.

1

Section Three. Finance

The investment model of the Tampa Bay Partnership has been designed to provide regional business leadership to the communities' economic development efforts. By design, this model offers each EDO the ability to leverage an annual investment into significant programs, products, services and policies that provide direct value back to each community served.

3.1 The EDOs value the collective total investment of the regional business community for the programs that provide direct value to each community served and understands the desire of the TBP to diversify their investor base among all of the communities.

3.2 The TBP agrees to work together (ie joint calls/presentations, list reviews, etc) with the EDOs *(if requested by the EDO)* to contact and communicate with business leaders identified as prospects for investment into the TBP. The TBP agrees that any communication regarding investment into the regional effort must stress the importance of investing into and strengthening the local efforts too.

3.3 All EDOs and the communities they represent are considered equal partners in the regional economic development model and will be requested to reach an equal level of annual investment (*Economic Development Partner – Level 1*) as outlined in the attached Investment Addendum. The investment levels and corresponding benefits will be outlined and reviewed annually.

3.4 The TBP may offer a fee for services for additional products/services as requested.

Section Four. Advocacy

4.1 The EDOs value the regional advocacy role of the TBP and support efforts to strengthen the region's policy and infrastructure issues that have an impact on economic development including utilizing the Bay Area Legislative Delegation as a mechanism for success.

4.2 The TBP values the unique role each EDO plays in its community in regards to Advocacy and Public Policy and is sensitive to the scope and responsibilities of each. It is recognized that while some EDOs have advocacy/policy responsibilities, others may not. EDOs without advocacy/policy responsibilities will alert the TBP to the appropriate community contact responsible for the specific issue under consideration.

4.3 The TBP and EDOs understand that there may be a diversity of opinions on issues. The TBP and the EDOs agree to utilize the EDO Partners Council as a forum to educate and to understand our differences.

4.4 The TBP and the EDOs will work together to identify and advocate for the policy/infrastructure issues in each community that are regional in scope or can be identified as having a significant impact to the region's economic development.

4.5 The TBP Policy Board is the appropriate authority to approve TBP advocacy efforts.

Section Five. Marketing & Research

Marketing and research has been the cornerstone of the Tampa Bay Partnership's program of work and will continue to be the priority activity in this new business development model.

5.1 TBP will work with the EDOs to annually develop and implement an effective economic development marketing program that will create awareness and interest in the communities of Tampa Bay.

5.2 TBP and the EDOs together will work to identify specific target industries and geographic markets to develop and coordinate regional strategies for growth. The EDOs understand the strategies and success of target industry growth may provide direct or indirect benefit to each community and a careful balance of target industries must be considered to ensure a direct impact to all communities.

5.3 TBP will work with the EDOs to provide research to identify opportunities and communicate strengths to the target industries and markets.

5.4 TBP will inclusively identify and define by name in all marketing materials, where appropriate, the communities of Tampa Bay as "The Metro Areas of Tampa/St. Petersburg/Clearwater|Lakeland|Sarasota/Bradenton/Venice and the Counties of Hernando, Hillsborough, Manatee, Pasco, Pinellas, Polk and Sarasota."

5.5 The EDOs can utilize the TBP for support of individual community marketing plans including co-operative marketing programs.

5.6 The TBP will be identified as the primary contact for inquiry on all TBP marketing materials and serve as a conduit for generating business inquiries for the EDOs.

5.7 EDOs agree to not directly market to businesses inside the communities of Tampa Bay.

The EDO agree to work together with existing companies that are pursuing expansion/relocation plans that may include more than one community in Tampa Bay. *(see 6.17)*

5.8 EDOs are encouraged to alert the TBP to inquiries that cannot be served by that community and may be better served by another community of Tampa Bay.

5.9 To ensure the accountability of resources, the TBP will provide the EDOs with monthly reports to identify activity and track results of marketing programs.

Section Six. Relationship Management

The foundation of success will be built on a commitment to honor the communication protocols created and to provide timely feedback on issues as they arise. Additionally, the new business development program requires a carefully coordinated process that clearly identifies roles and responsibilities for the Tampa Bay Partnership and the EDOs.

6.0 The TBP is expected to notify the EDO prior to set appointments with local government officials and elected leadership to ensure the EDO understands the purpose and expected outcomes. The discipline of this communication protocol is critical to the mutual success of both the TBP and the partner EDO.

6.1 The TBP and the EDOs agree to provide the client with a seamless service process. The TBP and EDOs will work together closely knowing that every deal is uniquely different and requires tremendous communication skills and process flexibility to react to the needs of the client.

6.2 The EDOs value the initial contacts and relationships built by the TBP's marketing and business development process.

6.3 The TBP values the role of each EDO as the point of contact and primary manager for that community for any project seeking sites/buildings, incentives, community-specific demographics, workforce development assistance, permitting/regulatory assistance and other services requested to ensure a safe landing.

6.4 The TBP will review and qualify all appropriate business development inquiries received by contacting each inquiry directly.

It will be requested that EFI copy the TBP on any leads distributed to a Tampa Bay EDO for the purpose of providing regional resources. When deemed appropriate by the recipient EDO(s), the TBP and the recipient EDO(s) will cooperate to enhance the response.

6.5 The TBP will provide initial screening of TBP inquiries to eliminate low grade or inappropriate opportunities.

6.6 The TBP will provide the EDOs with well researched and quality projects.

6.7 The TBP will categorize inquiries as follows:

Group A – Prospects:	*Distributed to EDOs for follow-up*
Group B – Suspects:	*TBP to follow-up/or distributed to EDOs (if appropriate)*
Group C – Rejects	*No follow-up needed*

6.8 Group A Prospects are defined as legitimate companies, capable of expansion or relocation. The contact person must appear to have decision making authority. The proposed project must meet minimum standards for employment and/or investment levels of 10 jobs/10,000 sq feet within three years of landing. The proposed project must be actively seeking a project start date within 24months of initial contact.

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6.9 Group B Suspects are defined as inquiries that may be legitimate leads but lack any number of key elements required for prospect status. At the discretion of the TBP, appropriate Group B Suspects may be distributed to EDOs for follow-up.

6.10 Group C Rejects are defined as inquiries that are not found to be legitimate.

6.11 The TBP will distribute all Group A prospects to all the EDOs (unless site selection decisions have already been confirmed) with a detailed summary and back-up research on the company, requirements, special requests and relationship information needed for each EDO to provide a response for that community.

6.12 Group A prospects that contact the TBP with a specific site already pre-determined will be distributed only to the corresponding EDO.

6.13 Each EDO will provide an initial response of interest to the TBP and provide the TBP with regular updates of activity conducted for each Group A project. These updates will occur through appropriate contact with the TBP and through bi-monthly meetings of the Marketing Committee.

6.14 The TBP will maintain contact and follow-up with all TBP Group A Prospects monthly or as directed by the prospect until the project has either selected a specific site/community or closed the search.

This contact will help to identify opportunities/threats and provide EDOs ongoing updates with intelligence identified/support needed.

6.15 Upon selection of a specific site or community by the Group A Prospect, the EDO becomes the primary contact and the TBP agrees to not contact the prospect unless directed by the EDO or initiated by the client.

6.16 The TBP will continue to contact and work directly with all B-prospects and will seek assistance from the EDOs for data, industry expertise, contacts, and ideas to either re-qualify the project as a Group A Prospect or Group C Reject.

6.17 In cases of an inquiry from an existing company in a community of Tampa Bay, the TBP with client permission will contact the representing EDO. The EDO will be responsible for follow-up with the existing company and will report back to the TBP within 30 days and recommend a strategy for follow-up.

If an EDO receives an inquiry from an existing company in a community of Tampa Bay, the receiving EDO is encouraged to seek client permission and encouraged to alert the EDO representing the community of the existing company.

6.18 When successfully landing a project initiated by or worked in conjunction with the TBP, the EDO is encouraged to seek client permission to alert and include the TBP at every opportunity in appropriate announcements and events celebrating the success.

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Addendum I. 2007 Investment Model For Economic Development/Community Partners.

Economic Development Organization/Community Investment Levels

$50,000 Economic Development Partner – Level I

Committee/Council Roles include:

- Council of Governors – Economic Development Advisor
- Policy Board/Board of Directors Member
- Public Policy/Advocacy Council Advisor
- Transportation Council
- Redevelopment/Workforce Housing Council
- Legislative Agenda Task Force
- Business Intelligence Council
- Economic Development Partners Council Member
- Marketing Committee Member and any associated task forces
- Market Maker recognition

Benefits include (but not limited to)

- Business Development/Marketing Partner Benefits:
  - Receive leads
  - Listed as "Community of Tampa Bay" on all marketing materials
  - Priority preference participation on missions/events/tradeshows
  - "Co-op" program participant (1/1 match on $ for marketing activities)
  - Regional business development/coordination support
  - Receive bulk distribution of all TBP Marketing Materials
- Center for Business Intelligence Benefits:
  - Included in all cluster strategy/business intelligence research activities
  - Included in Regional Scorecard
  - Access to D&B, Claritas, etc data sources
- Advocacy Benefits:
  - Included in Bay Area Legislative Delegation efforts
  - Included in Legislative Priorities
  - Included in Transportation Initiatives
  - Included in Redevelopment Initiatives
- Regional Leadership Benefits:
  - Invited to Regional Leadership Conference (1 free admission)
  - Nominate CEOs for CEODirect - Leadership Fastrack
  - Nominate leaders for Reality Check
  - Access to Vision 21 Long-term planning initiatives/outcomes

$10,000 Associate Partner – Level II *(note: this level is for chambers/communities/downtown development organizations with economic development objectives/strategies)*

- Marketing Committee Member and any associated task forces
- Transportation Council Member
- Redevelopment/Workforce Housing Council Member
- Legislative Agenda Task Force Advisor
- Business Intelligence Council Member
- Market Maker recognition
- Participate on missions/events (space available/fees apply)

This Strategic Economic Development Plan was prepared by:

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